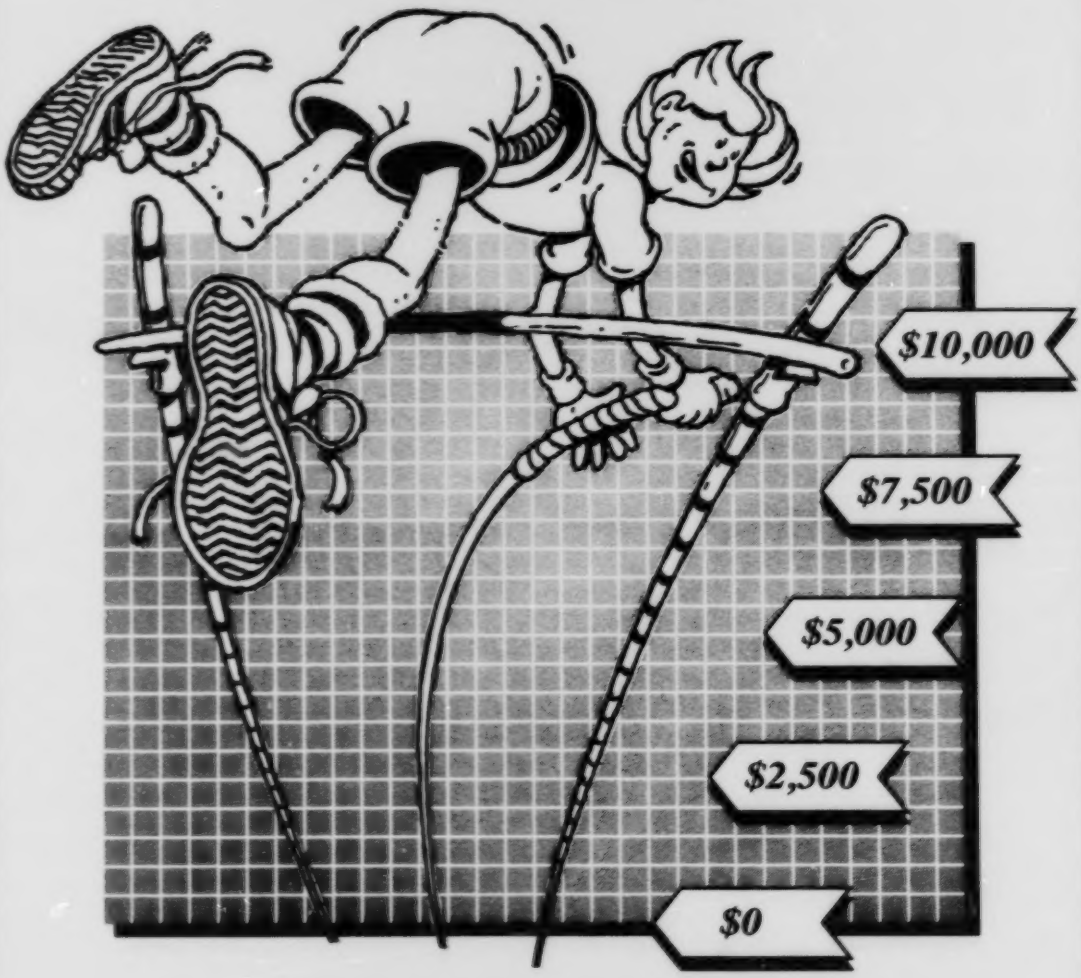
Fundraising Handbook

Fundraising for Community Projects



Northern Alberta Development Council

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The members of the Northern Alberta Development Council are pleased to present this handbook for use by northern residents.

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Introduction

To the Reader...

Fundraising. The very thought conjures up visions of paupers on a corner with tin cups in hand.

The ability of community-based non-profit groups to raise money has taken on increased importance in these economic and social times. Fundraising is becoming an essential source of revenue for many organizations.

Whether your organization needs to raise $1,000 or $100,000 or even more, this handbook can be of assistance. *Fundraising for a Community Project* is designed to guide you through the steps of raising money. It identifies paths for success, provides hints and suggestions, and offers recommendations and ideas. This fundraising handbook will take you through the complete process of a campaign by describing the best methodologies, approaches, techniques and strategies. The focus is on increasing your organization's possibilities for fundraising success.

To write this handbook, an extensive review of the literature was carried out and experts in the field were interviewed. As well, the people who are really in the know were consulted - northern fundraisers themselves. A survey was undertaken which identified over 100 fundraising projects that were taking place or had taken place in northern Alberta; a sample of those projects was selected and the project leaders interviewed in depth. (Appendix A has the list of respondents.) The interviewees identified the process that resulted in their success, the things that worked and the things that didn't.

They shared how they gained public support, how they worked with the media, where they got their funds. As well, they provided tips and suggestions for other northerners who are trying to raise money for their own community projects. Their comments form much of the basis of this handbook and their input is much appreciated.

You are about to embark on an exciting, challenging and at times frustrating journey. Use this guide as your map. It will show you the routes to travel, the forks in the road and the potholes to avoid.

Have fun, get creative and keep smiling. Success is within your reach.

Overview Of The Fundraising Process

The fundraising experience throughout northern Alberta suggests a definite process to raising money successfully, whether you are raising money for:

- Basketball backboards in Elk Point
- A public art gallery in Grande Prairie
- A mental health agency in Wabasca

Regardless of your purpose, the steps will be much the same.

Step 1: Build the Foundation

Before you jump into such a major activity as raising money, you need to do two things. First, ensure it is a good idea. Develop it; look at its pros and cons. Talk your idea over with friends, with your organization if you belong to one, and especially with members of the public. Without the broad support of the public, it will be difficult to raise the money you need.

Second, organize. If you don't already have a formal group, you may have to involve other people and perhaps form a society or get a charitable donations number.

Step 2: Develop Your Fundraising Campaign Strategy

Planning is where most groups tend to fall short. It is critical to plan for all aspects of the campaign. Identify possible sources of funds. Find the most likely sources. Set funding goals. Plan who will do what and by when. Organize and work with your volunteers.

Step 3: Launch Your Campaign

This is where you will start actually raising your money. You will need to approach potential donors, either in

person, through a written proposal, or with a public presentation and, as well, carry out any special events or activities you identified in your strategy.

Step 4: Manage the Process

A successful fundraising campaign doesn't happen by itself. It requires ongoing management of the entire process. You need to keep on top, maintain effective internal communication, and ensure the public is informed and supportive.

Step 5: Close Successfully

Even with the successful completion of your project there are still loose ends to tie up. Evaluate the overall results of your campaign and recognize those persons who contributed to its success. Keep your donors informed and show them how the money was spent.

The following flowchart outlines the specific points.

Fundraising Flowchart

STEP ONE

BUILD THE FOUNDATION

GET AN IDEA

GAIN COMMUNITY SUPPORT

ORGANIZE

• Leadership • Formalize • Office System

STEP TWO

DEVELOP YOUR CAMPAIGN STRATEGY

MAKE YOUR CASE AND SET A CAMPAIGN GOAL

IDENTIFY / RESEARCH FUNDING SOURCES

•Members • Community groups • Businesses
•Foundations • Corporations • Institutions • General public
•Governments - Federal, Provincial, Municipal
•Special events • In-kind donations

ASSIGN TASKS AND TIMELINES

Continued on Page 8

Fundraising Flowchart

Continued From Page 7

STEP THREE

LAUNCH YOUR CAMPAIGN

APPROACH DONORS
- In person • Proposals • Presentations
- Canvassing

ORGANIZE SPECIAL EVENTS AND ACTIVITIES

WORK WITH THE MEDIA

STEP FOUR

MANAGE THE PROCESS

KEEP THE PROJECT ON TRACK
- Review progress
- Review volunteer and media plans

RECOGNIZE VOLUNTEERS AND DONORS

KEEP COMMUNITY PERCEPTION POSITIVE

STEP FIVE

CLOSE SUCCESSFULLY

TIE UP THE LOOSE ENDS
- Collect pledges
- Complete paperwork
- Prepare financial statements

RECOGNIZE DONORS AND VOLUNTEERS

If you follow the steps and carry out your campaign with style and professionalism, your success will be practically guaranteed.

A Note About Terminology

Throughout the handbook, a number of specific terms are used, some interchangeably. Below are some of the more common words and their references:

Project
The reason for raising the money, for example the construction of a swimming pool, the purchase of a pager system, the development of a golf course.

Campaign
The overall strategy or plan for raising the money, including approaching potential funders and organizing special activities and events.

Event
One specific aspect of the campaign, such as a bake sale, raft race or membership drive.

Sponsors
Any individual, group or business that financially supports some aspect of an organization's activities, such as advertising or an event.

Potential donors, contributors
Any individual, group or organization that could give you money, goods or services.

Donors, contributors
Any individual, group or organization that does give you money, goods or services.

Do Your Groundwork. . . Building The Foundation For Local Fundraising

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Do Your Groundwork. . . Building The Foundation For Local Fundraising

It Starts With An Idea

Somewhere along the way you, or someone you know, said, "Have I got a great idea!" And when it was shared with a few others, they all agreed.

Great ideas, however, often cost money. Sometimes more than what is available. That's when someone else says, "Let's raise the money ourselves!"

In northern Alberta, that's how a lot of great ideas got their start.

"A handful of people on the society became alarmed at the overcrowding of the daycare and the other playschools in town and decided to pursue the parent/child concept."

Bonnyville Parent Child Centre, Bonnyville

"A couple of us were chatting about local folklore and how it would be good to collect some stories from the elders. The two of us started gathering some stories but the numbers kept growing. We applied for and got some PEP funding and the project just snowballed. We have since hired translators, editors and artists."

Grouse's Pouch, Kayas Cultural Centre, Fox Lake

"The need was overwhelming; the community was aware that over 100 women a year were turned away. The board of directors decided to pursue a larger facility."

Unity House,
Fort McMurray

The decision to proceed with a fundraising project is not to be taken lightly; it will impact on:

- Those who will benefit from the project
- Those who will fund the project
- Those who will organize the campaign

In essence, the whole community will be affected. For that reason, you will want to do some groundwork before you proceed.

DEVELOP YOUR IDEA

Before jumping into a major fundraising effort, spend some time exploring your concept. Ask yourself some questions that will help sort out what you want to accomplish. Refer to page 22 for a discussion on "making your case".

- What is the problem?
- How will your idea address it?
- Are there any other alternative solutions?
- Who stands to benefit from this idea?
- How does the project fit the needs of the community?
- What is a rough estimate of the cost?
- What is your organization trying to do and what does it need to fulfill its goals?

Armed with this information, you are ready to discover if you can count on general community support for your idea.

GAIN PUBLIC SUPPORT

It is important to share your plans with members of the community and gain their support because they will probably be expected to contribute financially to your project. They also stand to benefit from it. Visit, phone or write key community leaders. Let them know what you want to do and ask for their assistance and support in principle.

"We knew we had public support from the first public meeting when over 100 people showed up."

Peace River Indoor Pool Society,
Peace River

Not all fundraising projects obtain community support quickly and easily, however. Some projects tend to be more controversial in nature or may not be perceived by community members as necessary or as "do-able". The organizers are then faced with a major decision: should they scrap the idea, modify it, or

go ahead knowing the community may not be completely supportive?

Many projects don't get beyond this stage, but the northern survey indicated that some projects had difficulties gaining public support.

> **"The general public didn't believe it [the golf course] would go ahead; they became supportive when they saw something concrete - the artificial greens."**
>
> ***Swan Hills Golf and Country Club, Swan Hills***

> **"At times, we felt the community wasn't behind us. Once activities started taking place, views changed and people became more supportive and involved."**
>
> ***Fort Vermilion Bicentennial Project, Fort Vermilion***

It is possible to change a negative community perception to one of support, but it certainly won't happen without much effort and hard work. Weigh the pros and cons of proceeding with your project, but remember, once you decide to do it, there's no looking back.

Organizing For Local Fundraising

The first step to initiating a successful fundraising campaign is to get organized for a major undertaking.

You may have a group in place that is formalized, structured, incorporated and ready to jump into action. Or just a few interested people might want to pursue a good idea. Regardless of where you are in the process, the following points are critical to building the foundation for your fundraising project.

LEADERSHIP IS THE KEY

One of the best ways to predict the success or failure of a fundraising campaign is to ask, "Have credible and respected people been enlisted as active members of the campaign team?"

There are a number of ways to take advantage of the interests, abilities and expertise of local people to assist you with your cause: as directors on your board, as volunteers on the fundraising committee, or even as the campaign chairman.

Your Campaign Chairman

A critical factor in your success is to select a strong chairman. When looking

for a leader, be thoughtful, strategic and persistent.

> **"You need a key person involved. Our coach had the desire and the commitment; he was well-known, well-liked and had credibility."**
>
> ***Backboard Project, Elk Point***

There are a number of attributes you need in your leader. Look for qualities such as:

- Confidence and enthusiasm - Makes others want to join a winning team
- Influence - Can inspire others to put in the extra effort, perform beyond the call of duty
- Availability - Willing to give priority attention to the project; provides time and talent
- Team Spirit - Able to provide voluntary leadership and accept professional direction
- Organizer, delegator, decision-maker - Can run meetings, give clear directions, get others involved
- Committed to the cause - Both in principle and financially

To identify someone who could serve as the chairman, do some brainstorming with your group. Keep in mind local community leaders, business people, retirees, elders.

Before approaching a potential leader, be prepared to answer questions about the responsibilities involved, the time required and the support available. Be clear on your expectations.

There are other leadership approaches you could consider for your project: an honorary chairman or co-chairmen.

- Honorary Chairman
  - The role is essentially that of a figurehead.
  - The individual should be influential and well-connected.
  - Expectations, duties and responsibilities should be clarified in advance.

- Co-chairmen
  - Two people share responsibilities.
  - They should have complementary skills, talents, interests.
  - They preferably have worked together before.
  - They should choose each other as opposed to being selected separately.

Board of Directors

Your board of directors should consist of respected and credible individuals. It should also reflect a mix of people and backgrounds.

- People who can provide a range of skills, including bookkeeping, legal, or computer, are beneficial.

- People who represent business or industry are often overlooked. Individuals who can influence corporate giving decisions are extremely useful. If you are unable to secure someone at the senior level, focus your attention on the spouse who may also be able to wield influence.

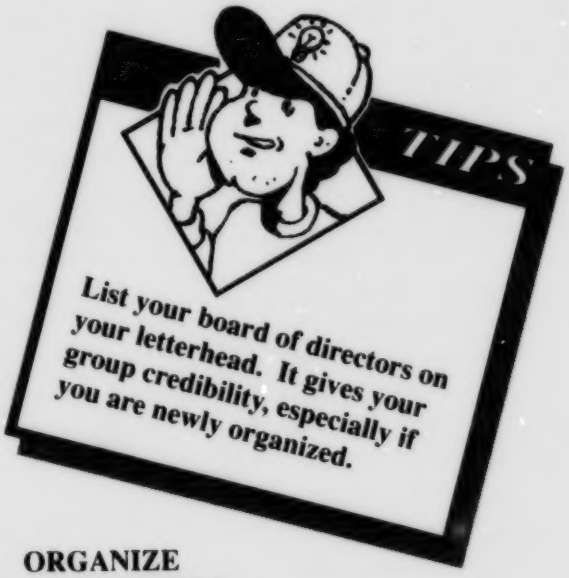
- Government employees are also well-connected and can provide inside knowledge of the workings of government.

- People who reflect your community add a necessary dimension to a board. Try to involve homemakers, elders, students.

"The key to our success was a stable, balanced board representing the community and not the fringe."

Unity House,
Fort McMurray

Regardless of whom you approach and accept, ensure each is committed to your cause. You don't want a "token" professional but someone who is dedicated to the project and is willing to go that extra mile.


TIPS
List your board of directors on your letterhead. It gives your group credibility, especially if you are newly organized.

ORGANIZE COMMITTEES

Once you have formed a board of directors, consider the establishment of a variety of committees. An executive committee consisting of a president, vice-president, secretary and treasurer should be established. As well, a fundraising committee will form the foundation for your fundraising campaign.

In addition, you may want to set up a:
- Finance committee
- Publicity committee
- Membership committee
- Special events committee
- Building committee

Some fundraising campaigns are very informal and do not see the need for committees or sub-committees. There is no one way to carry out a campaign - do whatever works best for you and your group.

SET UP AN OFFICE SYSTEM

Early on in the process, set up an office system to keep track of information and records.[2]

You'll want to make a file on everything. Divide the files into categories and then alphabetically. Make two copies of everything, filing one in a subject file and one in a chronological file.

Some other suggested files include:

Chronological file
Keep a copy of *every* letter that is sent out in a chronological file.

Donor card file
Keep track of every donor, noting name, address, and donation amount and date. Record donor contact to ensure your activities are coordinated and to avoid duplication of efforts or unfortunate omissions. One person should be responsible for maintaining records and entering dates of any contact with each donor.

Mailing List
Develop a comprehensive list of anyone involved with your organization.

Archives
Keep a binder of every article, proposal, news release, picture or reference to your group in the media.

Proposals
Maintain copies of proposals and letters sent to various funding organizations and replies received from them.

Statistics
It is important to document activities of your group for present and potential funders as well as news releases and presentations. Some statistics include:

- Number of clients
- Programs and services offered
- Number of speaking engagements and audience size
- Number of volunteers and volunteer hours

FORMALIZE YOUR GROUP

There are two steps that can be very important to an organization which is undertaking a major fundraising effort:

- Incorporating as a society
- Obtaining a charitable donations number

Both of these actions may be critical to receiving contributions. To be eligible for some funding sources such as government programs, you may need to be a registered society. Other sources such as corporations and foundations may only provide a donation if you have a charitable donation number and can give them an official income tax receipt.

If your fundraising project is short-term or one-time-only, you may want to obtain the sponsorship of a larger, established organization. You may be able to use its society status and charitable donation number rather than go through all the steps yourself. Certainly, the legal and accounting expertise on your board or finance committee should be involved in this decision.

Forming a Society

Incorporating as a society has both legal and organizational benefits: [1]

- An individual member of a society cannot be held legally responsible for a debt or liability of the organization.
- An incorporated society can hold title to property or hand out contracts in its own name.
- Incorporation shows a measure of credibility and stability.
- Incorporation is a qualification required by many corporations, foundations and government departments which dispense funding.
- Incorporation can assist an organization to become a legal charitable institution with its own Revenue Canada registration number.

In Alberta, an organization with five or more people can incorporate under the Societies Act of Alberta for any number of purposes, such as charitable, artistic or agricultural. It is relatively inexpensive to register as a non-profit society. A non-profit group which also operates in other provinces should incorporate either in those provinces in which it operates or nationally. The federal government and each provincial government have departments that deal with society incorporation. These departments are typically called "Consumer and Corporate Affairs".

Information about or applications for incorporating can be obtained from:

Corporate Registry
Alberta Consumer and Corporate Affairs
8th Floor, John E. Brownlee Bldg.
10365 - 97th Street
Edmonton, Alberta
T5J 3W7
Phone 427-2311
Fax 422-1091

Corporation Branch
Consumer and Corporate Affairs Canada
Place du Portage
Phase 2, 4th Floor
165 Hotel deVille Street
Hull, Quebec
K1A 0C9
Phone (819) 997-1142
Fax (819) 953-5767

Obtaining a Charitable Donations Number

Foundations, corporations and individuals often donate money in order to receive a tax deduction. To be able to provide an official tax receipt, you need to be registered as a charitable organization under the Federal Income Tax Act. A charitable organization is legally defined as any "bona fide benevolent philanthropic service, educational, recreational, or other community organization which operates without profit to its members." Registering as a charity has several benefits:[4]

- The organization will be tax exempt.
- Donations given to the registered charity are tax deductible.
- It assures donors that the donations will be used solely for charitable purposes.

In order to qualify through the Income Tax Act, the organization must declare its purpose as fitting into one of four categories:

- The relief of poverty
- The advancement of religion
- The advancement of education
- Other purposes of a charitable nature that benefit the community as a whole

Forming a society is not a prerequisite for obtaining a charitable number. However, the two steps often go hand-in-hand. You may want to discuss the benefits of each with the respective government departments.

Contact your nearest federal District Taxation office at 1-800-267-2384 to obtain a registration kit or information on obtaining a charitable donation number.

Plan, Plan, Plan... Developing Your Fundraising Campaign Strategy

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Community Organizations/Service Clubs
Local Business and Industry
Local Institutions
Municipal Governments
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Provincial and Federal Governments
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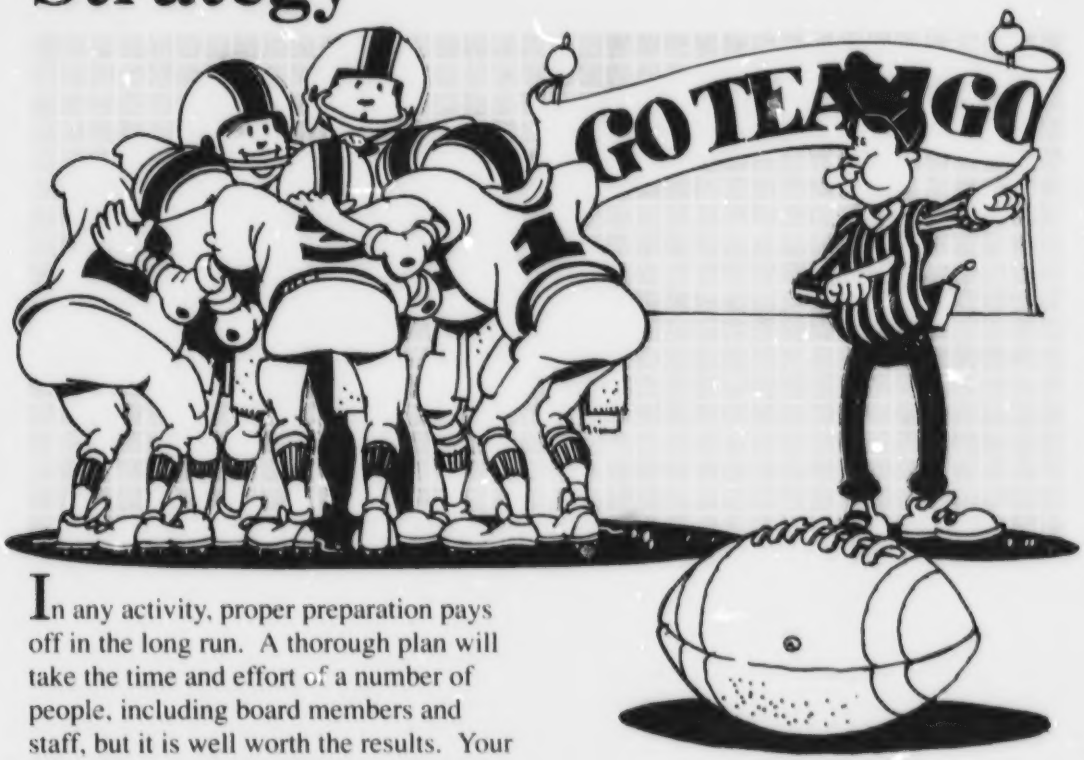
Plan, Plan, Plan... Developing Your Fundraising Campaign Strategy



In any activity, proper preparation pays off in the long run. A thorough plan will take the time and effort of a number of people, including board members and staff, but it is well worth the results. Your fundraising strategy will serve as your blueprint of future success.

Virtually all of the northern fundraisers surveyed had carried out some advance planning.

> **"We developed our plan in phases based on our reconstruction activities. Then, we matched up our funding sources to each phase."**
>
> ***Blacksmith Restoration Project, Sexsmith***

Your plan should address all the details of your fundraising plan and answer the questions: who? what? when? where? and why?

- WHY are we doing this fundraising?
- WHAT amount and type of funding are we looking for?
- WHERE are the funding sources?
- WHO will carry out the plans?
- WHEN will it be done?

Why? Making Your Case

At the start of the planning process, it is important to review the overall scope of the project and summarize your group's reasons for doing it. This will provide you with the information needed to approach potential donors. Basically, you must sell your cause, or, in fundraising terms, *make your case*.

You have a good reason for asking for money. You know your project is a good idea and your organization knows that it's a good idea. But does everyone else think it's a good idea? This is where making your case comes in.

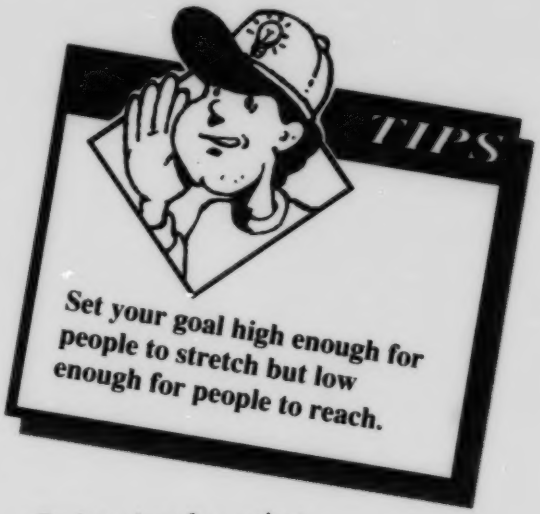
The following questions can help your organization develop its case.[5] Examine each of them as a group and list all of your answers. Anticipate the possible questions or concerns that might be raised.

- Does the need go beyond the organization itself? Is it a community need? How will the community benefit?
- Is the need genuine? Can you prove it exists?
- Is your organization capable of meeting the need? Is any other organization doing it already?
- Is your organization well-managed and financially sound? Does it have respected leadership? Are you well-known and reputable?

A large project, particularly a capital project, may do well to have a feasibility study undertaken to answer some of these questions. Sometimes a study conducted by an outside, objective source can provide hard evidence and add credibility to the overall plan.

Once you've examined your case from a variety of angles, identify the benefits of your project and its key selling features. Use this information to develop your proposal, your presentation and your appeal to the donor.

What? Identifying The Amount And Type Of Funding Required



Your budget is critical to your campaign success and to meet your project goals. Its accuracy, thoroughness and achievability can make or break your project and affect the credibility of your entire organization.

IDENTIFY YOUR CAMPAIGN GOAL

What amount of funding are you looking for? Do you have a budget to back it up?

Your budget is basically your campaign goal. Ensure it is realistic and achievable and one in which everyone has confidence. Consider the following points as you determine your financial needs:

- Break down the budget details and provide justification.
- Ensure your budget is reasonable and realistic. A padded budget is easily spotted and reflects poorly on your organization.
- Keep your contingency costs below 10% of the total budget.
- Budget time for project management as it is a necessary component of the project.
- Consider how inflation may impact on your estimates if your project spans more than one year.
- Include bookkeeping/auditor fees for projects over $30,000.
- Include any anticipated revenues.

DETERMINE THE TYPE OF FUNDING YOU REQUIRE

There are three main kinds of funds to raise:

- Project funding
- Core or operational funding
- Capital funding

Although each type of funding has unique characteristics, the same basic fundraising principles apply to all.

Project Funding

This type of funding is for a specific activity that has a beginning, an end and a tangible final product. For example, the Lifeline Project in St. Paul raised money over a six-month period to purchase 12 medical emergency response systems.

Project funding is popular with government, foundations and corporations for a number of reasons:

- The project is finite.
- There is usually a tangible product which can be evaluated.
- It can be assigned a definite budget.

Core or Operational Funding

Core funding is the money used to operate an office, pay wages and rent, and purchase supplies and office equipment. Both the Prairie Gallery in Grande Prairie and Peekiskwetan Let's Talk Agency in Wabasca/Desmarais fundraise for operational dollars.

This funding is the most difficult to raise. Potential donors are wary because:

- They have no way to judge how the money will be used.
- They cannot clearly identify or measure what will be accomplished.
- Core costs tend to grow.

TIPS

If your organization is service-oriented and looking for core funding, you may do well to break your needs into projects and work around a specific activity. You can budget portions of staff time and overhead as legitimate project costs. For example, rather than look for a year's operational dollars for a crisis agency, design a project around a specific public awareness campaign for teens, or a pilot for a battered women's support group, or a volunteer training program. Using a variety of projects, you might more readily obtain staff salaries and cover overhead costs.

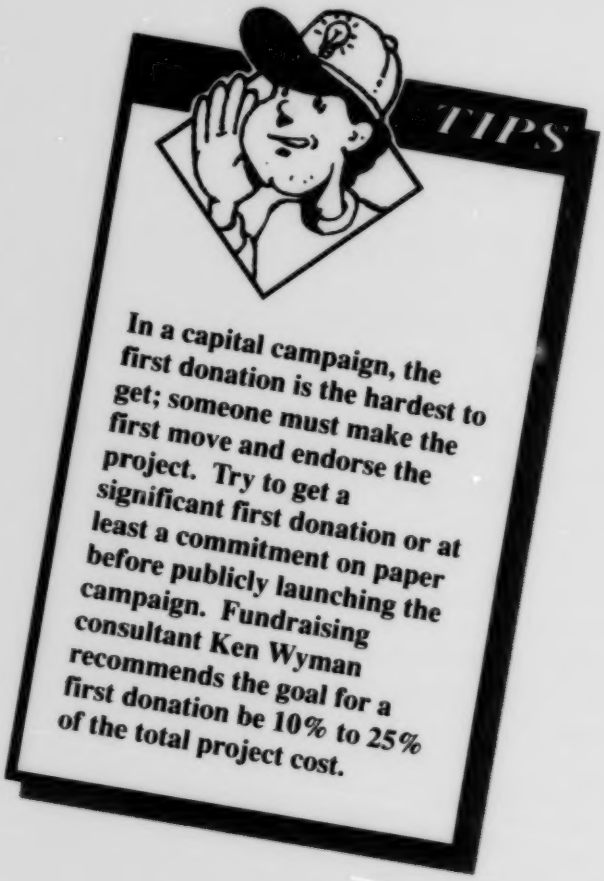
Government programs may be more likely to core fund than would corporations or foundations. Membership fees can also support core costs.

Capital Funding

When raising money for a building, land or machinery, you are capital fundraising. The golf course in Swan Hills, the community centre in Grassland and the swimming pool in Peace River are all capital projects.

Capital fundraising is a specialized and sophisticated form of fundraising. Much information needs to be gathered *before* making a decision to take on a capital project. Your group may want to consider that:

- You will be competing with large, established institutions such as universities and hospitals for capital dollars.
- You can't build half a building. This is a "make or break" proposition.
- Your proposal must indicate plans for funding operations and maintenance after the building is built. If you can't afford the power or staff, the building is useless. The long-term operating and maintenance costs must be well thought out.
- Donations made for a capital campaign cannot be used for any other purpose.


TIPS
In a capital campaign, the first donation is the hardest to get; someone must make the first move and endorse the project. Try to get a significant first donation or at least a commitment on paper before publicly launching the campaign. Fundraising consultant Ken Wyman recommends the goal for a first donation be 10% to 25% of the total project cost.

Set up a trust fund in the bank, set a target date to raise the money by and give it your best shot. If you do not have all of the money, or even 75% of it, give it back - with a note of thanks.

Don't jump impulsively into a capital campaign. Once the project is launched, your group's reputation is at stake and there could be major repercussions if it fails. Investigate thoroughly first.

Where? Looking For Potential Funding Sources

The "where" of a fundraising strategy is really the foundation of your whole plan. This is where you will:

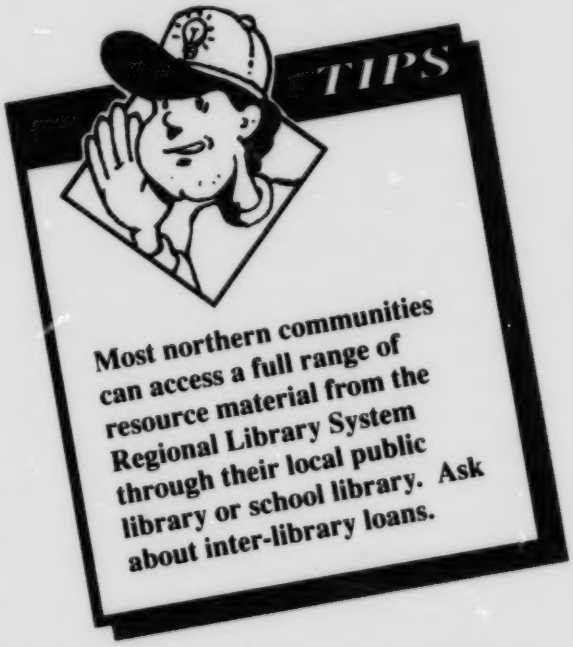
- Identify all the potential sources of funds
- Find out about each of them
- Determine which sources look the most promising
- Set target goals

With knowledge of the type of funding you are looking for, you will have a better idea of whom to approach and how to approach them.

IDENTIFY POTENTIAL SOURCES OF FUNDING

Northern communities have a full range of potential funding sources - it is just a matter of identifying them. Brainstorm with your group members to get a list of possible sources available in your community for donations, sponsors and volunteers.

- Town office - Local business licensees
- Chamber of Commerce - Membership list
- Recreational Director - Local recreational groups
- Family and Community Support Services office - Community directory of agencies
- Canada Employment Centre - Employer list
- Yellow Pages
- Consumer and Corporate Affairs - Local societies
- Library - Reference books on:
  - Foundations
  - Government programs


TIPS
Most northern communities can access a full range of resource material from the Regional Library System through their local public library or school library. Ask about inter-library loans.

Your final list might look something like this:

Members of Your Organization

- Directors
- Employees
- Clients
- Alumni
- Volunteers
- Past supporters

Community Organizations and Service Clubs

- Service Clubs - Lions, Elks, Kinettes, Kinsmen
- Church Groups
- Business Groups - Rotary, Chamber of Commerce, Board of Trade, Unions
- Recreational and Sports Clubs
- Police, Fire and Emergency Departments
- Legion, Royal Purple
- Toastmasters, Professional Associations
- Children's Groups - Scouts, Cubs, Brownies, Girl Guides, Minor Sports
- Seniors organizations

Institutions

- Hospitals
- Long-Term Care Facilities - Nursing Homes, Auxiliary Hospitals
- Schools
- Post-Secondary Facilities - Colleges, Consortia

Local Business and Industry

- Independents
- Franchises
- Professionals - Dentists, Physicians, Lawyers, Accountants
- Farmers

Non-Local Business and Industry

Municipal Governments

- Village, Town or City Councils
- Improvement Districts
- Municipal Districts
- Counties
- Metis Settlement Councils
- Indian Band Councils

Foundations

- Provincial
- National

Corporations

- Locally based Subsidiaries
- National Firms
- Utility Companies

Governments

- Provincial
- Federal

General Public

FIND OUT ABOUT POTENTIAL FUNDING SOURCES

From this long list of potential funders, determine which of them would be the most likely supporters of your project. Research each prospect.

Find out about potential contributors through the donors themselves or people who either know the donors or who have benefited directly from them. If this is not possible, find out more about potential funders through other sources, such as directories and membership lists, from which you can establish your primary contact.

As you carry out your research on each prospect, you will want specific information to help you decide if that prospect is worth pursuing. First, you need to know the "history of giving" for each potential donor you identified. If there is a history of giving, then:

- Whom have they given to? How much did they give? What kind of projects have they funded?
- What are their criteria for giving?
- What are their interests and areas of priority? Are there any restrictions on their funding?
- How much do they contribute annually? How much is already committed? How much is available now?
- Do they have applications and funding guidelines? What is the process to submit an application?
- Who makes the funding decisions? When do they make their decisions? Who is the contact person?

If there is no history of giving, then why not? Is there any potential there at all?

Second, find out:

- Who is the person in charge - chairman, president, owner, chief executive officer?
- Who is the head administrator - executive director, coordinator, manager?
- Who is on the board of directors?
- What is their product or service?
- What is their address and phone number?

These questions can apply to almost any potential funding source. With the answers, you will have an excellent idea of whom to pursue further for a contribution.

The various funding types are discussed below. Understanding their differences will help you seek support from the sources most appropriate to your needs.

Members of Your Organization
Those involved with or who benefit from the activities of your organization should be considered prime donors in your campaign. Their contribution:

- Lends credibility to the overall campaign by providing an indication that they believe in the project and are willing to back that up.
- Sets a powerful example to other donors.
- Enhances staff and board commitment to the project and is good for team spirit.

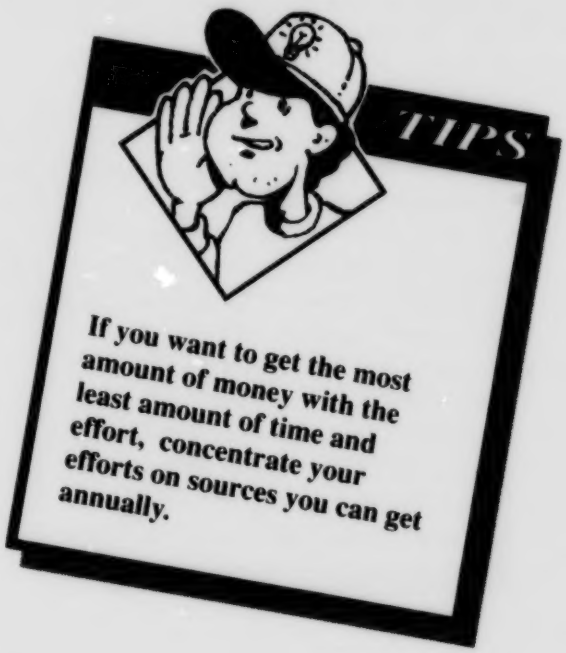
Membership donation should be voluntary rather than obligatory; it is an opportunity to invest in something people believe in and want to see come to fruition.

Membership Dues
Membership dues are the most popular method of raising money from members. They are dependable, renewable and increase the commitment in the members. Rates can be a flat fee or on a sliding scale, depending on level of involvement and ability to pay. Start with a minimum rate and then increase the price and the privileges as you move up the scale, e.g., individuals, groups, supporters, sponsors, life members. Offer discounts to students or seniors.

Pledges
Pledges involve setting up a payment schedule for making donations. A member can pledge a certain amount, such as $5, and pay it in instalments - monthly or quarterly. Pledges can allow even small givers to make important contributions.

Fee-for-Service
More and more community groups are going to a user-pay approach. Even a small fee for a service you normally provide for free can make a difference in your budget. Of course, you can always make exceptions for those on limited budgets.

Another aspect of fee-for-service is to sell your services outside your organization. Sell newsletters to the general public, sell consultive or research services to


TIPS
If you want to get the most amount of money with the least amount of time and effort, concentrate your efforts on sources you can get annually.

government, sell computer time, clerical skills, printing services, public speaking skills. Look for creative ways to turn your organization into a money-making business.

Community Organizations and Service Clubs

Local non-profit groups have much in common with each other. They share a concern for the well-being of their members and the overall health of the community. They can be an excellent source of funds and can make major contributions toward local projects. Some groups will even take on a cause and commit long-term financial support over several years. They can provide donations on a per capita basis (so much per member) or they could hold a fundraising event of their own and donate the proceeds to your group.

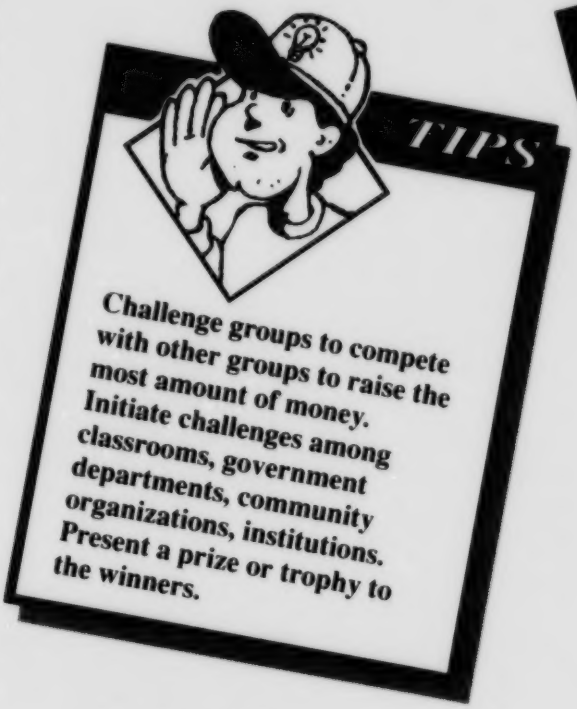
Local Business and Industry

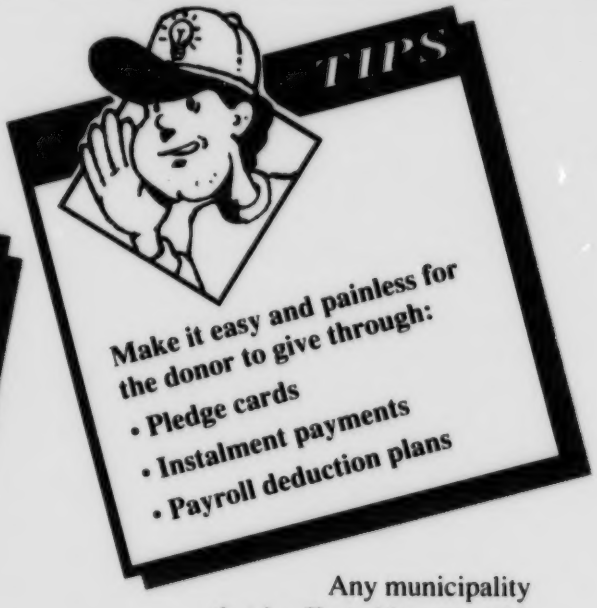
Most communities have a range of businesses - from the small independent to the larger department store or car dealership to the national bank or insurance company. There are also professional corporations which include physicians, dentists, lawyers and accountants. This sector is tapped very often and competition for this funding is very high. Look for special ways to attract their support, as these businesses can supply consistent support in moderate amounts. Larger businesses can possibly be a source of sizable, renewable and unrestricted donations. Look to local businesses and industry to provide donations of cash or contributions of goods and services in-kind.

Don't forget about businesses located outside of your community but which have a direct or vested interest in the town or your project.

TIPS

Matching donations are effective with businesses and institutions. For every contribution made by an employee, the employer will match it. For example, for every $1 donated by an employee, the employer contributes $1 (or $2 or $.50). This approach has great potential; if you get one employer to agree, it can be used as an example for other businesses to follow. Matching contributions can be initiated by the employer, the employees or a union or labor group.


TIPS
Challenge groups to compete with other groups to raise the most amount of money.
Initiate challenges among classrooms, government departments, community organizations, institutions.
Present a prize or trophy to the winners.

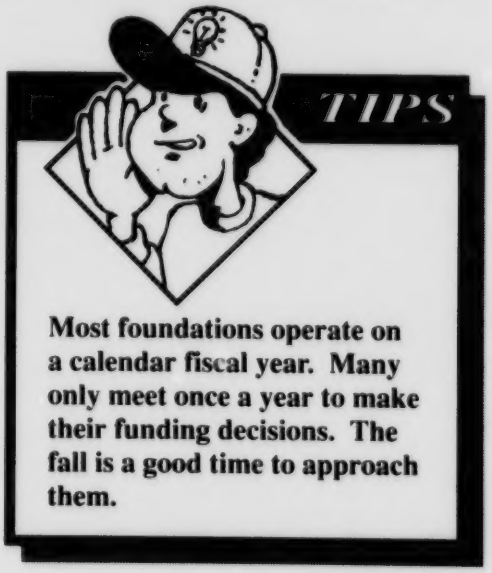


The Peace River Indoor Pool Society identified and approached non-local suppliers who had contracts with the Town of Peace River and asked for donations. The suppliers have a vested interest in the town and many were interested in supporting local activities.

Local Institutions
Hospitals, long-term care facilities, schools, educational consortia, and colleges can be potential sources of funding. Substantial contributions are possible with a moderate investment of time to research and approach.

Municipal Governments
Local governments often build into their budgets some funds for local projects. Any municipality that is affected by, or could potentially benefit from, your project should be approached.

Foundations
Foundations vary in size, purpose and structure. They may target their funding in a number of ways: by restricting donations to a specific geographic area, such as Edmonton; by defining a special


TIPS
Most foundations operate on a calendar fiscal year. Many only meet once a year to make their funding decisions. The fall is a good time to approach them.

area of interest, such as research activities; or by identifying specific sub-groups, such as the handicapped. Some foundations tend to be very innovative and look for new and exciting projects to fund. Most, however, give the majority of their money to large, traditional campaigns, such as hospitals or universities.

Information on foundations can be found at most public libraries. One key source is the *Canadian Directory to Foundations*, published by the Canadian Centre for Philanthropy. It lists all of the foundations in Canada, as well as those in the U.S.A. that have provided grants in Canada and provides information such as address, purpose, area of interest, limitations on support, and how to apply. It also includes a listing of grant recipients over the past year and how much they received. The preface of the *Directory* contains useful information on approaching foundations and provides additional services of the Canadian Centre for Philanthropy. One service of the Centre is to run computerized searches of foundations whose goals match your needs. There is a nominal fee.

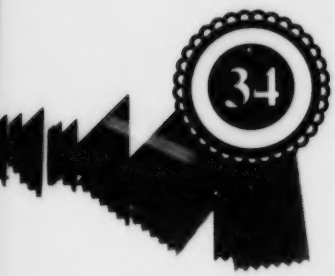
The Canadian Centre for Philanthropy
74 Victoria Street, Suite # 920
Toronto, Ontario
M5C 2A5
Telephone: (416) 368-1138.

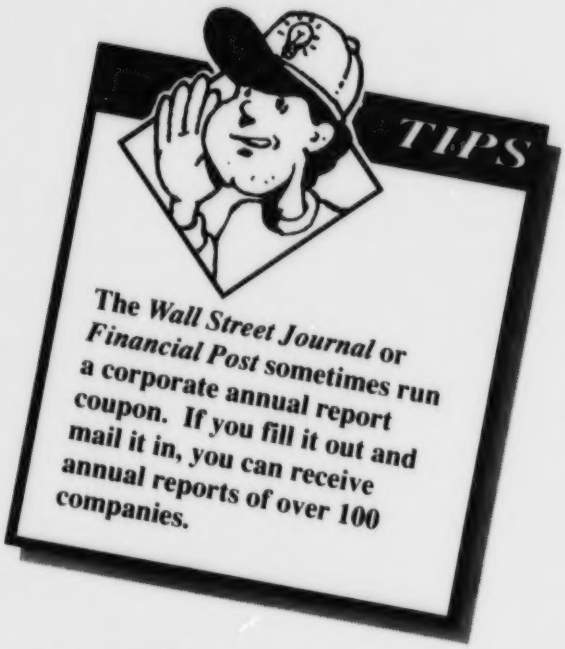
Once you have selected a number of foundations, call or write them and ask for their annual reports, application forms and any other information on their funding programs. Analyze the information thoroughly. Note the groups and activities that were funded and how much they received. Try to identify foundation priorities and any other information that would be useful to tailor your proposal.

Discard all foundations not connected to your type of project and focus on the select few.

TIPS

For more information on a particular foundation, order its Public Information Return (T3010) from Revenue Canada. It provides a complete picture of the foundation's income, assets and contributions, as well as its current and special interests. To contact the Charities Section of Revenue Canada, call toll-free to 1-800-267-2384 and have the charitable donation number of the foundation ready.




TIPS
The Wall Street Journal or Financial Post sometimes run a corporate annual report coupon. If you fill it out and mail it in, you can receive annual reports of over 100 companies.

Corporations

Many corporations set aside some funding to support community projects and non-profit groups. Corporations can be locally based industries, utility companies, or national companies.

Many corporate donors are sincere about giving and take their role seriously.[6] They give money because they believe they have a social responsibility to the community. Some, however, give primarily to take advantage of tax write-offs and to generate good public relations.

As with foundations, the best way to find out about corporations is to contact them by phone or in writing and request a copy of their annual report and any other information they have on their community support programs. Review the material thoroughly to determine their suitability for your project.

Provincial and Federal Governments

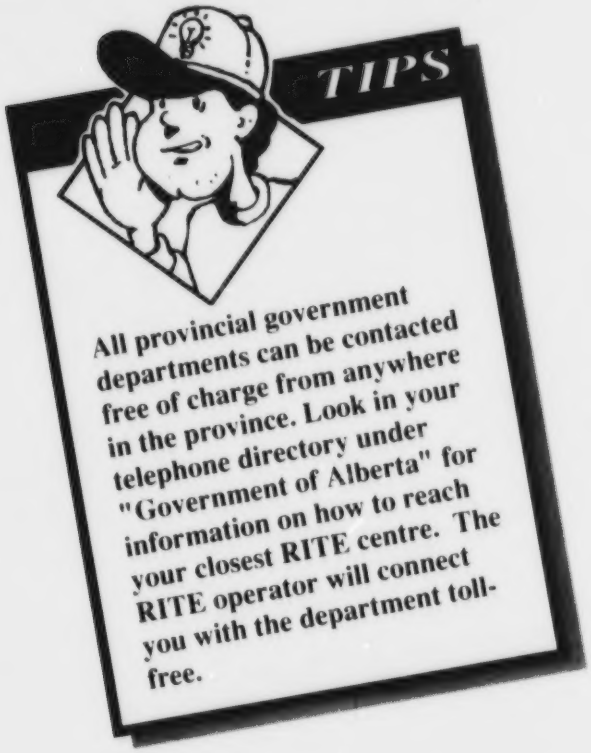
Government funding has diminished considerably over the past years which accounts for the increase in fundraising activities. Nonetheless, there will always be some grant money available in one form or another. The key is in tracking down the applicable programs.

> **"The provincial government was very involved with our project. Alberta Culture provided resource people who had much experience and expertise. We couldn't have done it without them."**
>
> ***Blacksmith Shop, Sexsmith***

There is a wide range of government programs available to approach. To identify programs applicable to your project, try various approaches:

- Contact the office of your local MLA or MP. The staff there can be very useful in referring you to the appropriate departments.

- Go to a provincial government office and ask to use the RITE telephone directory. This Regional Information Telephone Enquiries (RITE) book lists contact names and phone numbers for all provincial government departments, boards, councils, crown corporations and


TIPS
All provincial government departments can be contacted free of charge from anywhere in the province. Look in your telephone directory under "Government of Alberta" for information on how to reach your closest RITE centre. The RITE operator will connect you with the department toll-free.

commissions, as well as the branches and divisions within them. A few phone calls can determine which departments would be most appropriate to approach for funding.

- Contact "Information and Referral to Federal Programs and Services" through *Reference Canada* listed in your phone book under the Government of Canada.

- Invite a government employee who supports your cause to assist you. Civil servants are intimately familiar with government programs and often have contacts in a variety of departments.

Once you have identified potential government programs, contact them and ask for detailed information, such as brochures, eligibility criteria, guidelines and application procedures. Many programs have field officers who will come out to meet with you to share information on their program and determine your eligibility. Make good use of these people as they often make the initial recommendation for project approval or rejection. If most of your contact is done over the telephone, try to deal with the same person all of the time in order to develop a relationship with that individual.

General Public

It takes a sizable time investment to raise money from the general public. However, the local community is a reliable and consistent source of income, especially for projects it feels are essential. When you involve local residents, you can also expand your membership base and raise the profile of your group and its achievements.

Raising money from the general public can be done in two ways - directly or indirectly. Many campaigns use a combination of both.

- The **direct approach** is asking for money for your cause, either face-to-face, by telephone or by letter.

- The **indirect approach** is holding special events and activities. You raise

money by providing the donor with something in return - using the proceeds to support your cause.

Direct Approach

Asking for money from the public can take several forms.[7] The more direct and personal the approach is, the more effective it is.

1. DOOR-TO-DOOR CANVASS

- This is the most direct form of solicitation.
- For success you will need:
  - Lots of help, staff or volunteers
  - A project with wide appeal
  - Lots of time for planning and management.
- Very rewarding as, even though the gifts are small, there are many of them.
- An excellent way to create grassroots awareness and support.

2. TELEPHONE CANVASS

- This is less direct than the door-to-door but still has personal appeal.
- Volunteers are recruited to donate a number of hours for phoning potential givers.
- A thank you and invoice is mailed with a pledge; an acknowledgement is sent when the cheque arrives.
- There is minimal expense.

3. DIRECT MAIL

- This approach is less personal than above but still involves individual communication.
- It involves developing a mailing list, getting a package together and a mail-out.
- Expensive: the costs include printing, paper, postage, staff time.
- The rate of return is about 1%: requiring much planning and follow-through.
- Approach others who have done it for tips and suggestions.

The direct approach provides an opportunity for the community to demonstrate its support in a very tangible and concrete way.

Indirect Approach

Events and special activities are a key method of raising money and offer many non-monetary benefits. Events and activities also:

- Draw the community together
- Allow people to meet, socialize and get to know each other
- Attract people who might not otherwise contribute
- Are fun for everyone

The types of special activities and events available are limited only by your imagination. Northerners have

undertaken a full range of these. A sampling of events held in Northern Alberta is listed below by the approximate range of dollars raised. Other ideas can be found in Appendix B.

- Basketball shoot-a-thon ($2,000)
- Fall supper, Valentine's supper ($500 - $1,000)
- Donations for each square foot of construction at $62 ($30,000)
- Art Auction ($13,000 and $16,000)
- Royal Lippazon Stallions ($3,300)
- RCMP Band ($350)
- Trade fair ($1,000)
- Dream auction ($8,000)
- Dunk tank ($500)
- Donations box ($700)

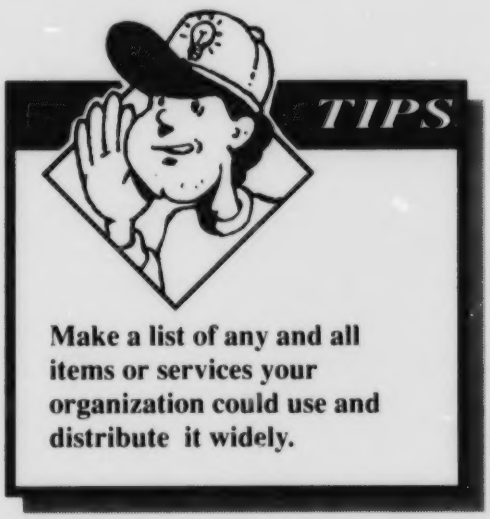
The type of event you choose has a significant effect on its success. To help decide, ask yourselves the following questions:*

- Does this activity have the potential to make the money we need?
- Is there sufficient interest or desire for this activity?
- How many volunteers are available?
- What are our capabilities, skills and talents?
- What facilities are available?
- What kind of events held in our community have been successful?

You may want to start your campaign with relatively easy and low-risk events. Once your confidence is built up, graduate to something larger and more complex. Generally, a large project is more risky than a small project in that if it fails, you could lose large sums of money. However, if it is successful, the potential for profit is much greater.

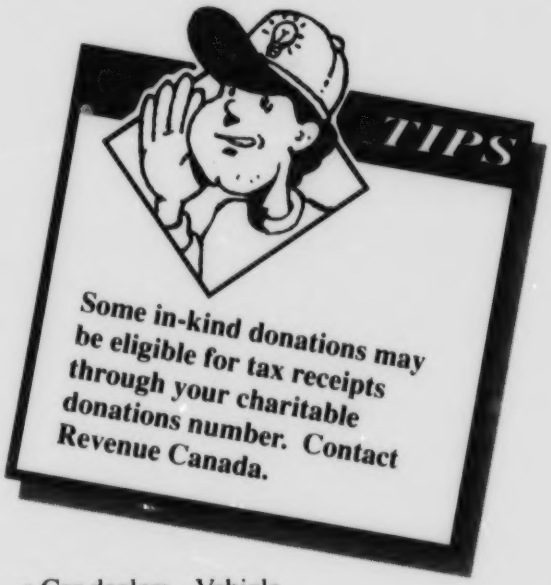
THERE'S MORE THAN CASH: IDENTIFY OTHER RESOURCES

Fundraising campaigns tend to focus on financial needs and raising money. Often overlooked is the range of non-cash



contributions: goods and services. In-kind donations are readily available locally and their cash value also goes toward achieving your goal. The range of possibilities for in-kind contributions is endless and limited only by your imagination.

As with other resources, identify the goods and services you need and find the most probable sources. Acknowledge receipt of these resources in the same way as any cash donation.


TIPS
Some in-kind donations may be eligible for tax receipts through your charitable donations number. Contact Revenue Canada.

"The second element of our plan was how to raise donated labor and equipment. We approached local contractors and businesses regarding donations, especially donated services, labor and equipment. We raised tens of thousands [of dollars] this way!"

Grassland Community Centre, Grassland

Goods

The best examples of in-kind contributions which everyone is familiar with include donations of office furniture, equipment and supplies. Other ideas for goods and their sources include:[9]

- Print Shop - Paper stock
- Families - Food, clothes, toys
- Retailers - Surplus inventory
- Florists - Flower arrangements
- Car dealers - Vehicle (used or new)
- Celebrities - Personal items to sell or auction
- Building Suppliers - Cement, tools, lumber

Services

The range of services that an organization can take advantage of is endless:[10]

- Schools - Photocopying
- Churches - Meeting rooms
- Businesses - Computer time, telephones, clerical support
- Printers - Flyers, brochures, posters
- Professionals - Accounting, legal, technical assistance
- Government - Mailing services, photocopying, supplies

- Corporations - Executive time, publicity services
- News media - Publicity, promotion
- Building Trades - Landscaping, hauling, design

Some sources, particularly businesses, prefer to contribute in-kind donations rather than cash. Take advantage of any contributions you can - each gets you closer to achieving your goal.

TARGET DONORS AND AMOUNTS

One of the final steps in developing your strategy is selecting the funding sources to approach and determining realistic funding goals for each category of potential donors. Three methods for doing this include the use of percentages, formulas or a standards chart.

Percentage Basis

If your total project requires $30,000, your targets could look like this:

CATEGORY	AMOUNT	PERCENT
Government	$ 1,500	5%
Corporation	$ 6,000	20%
Foundation	$ 7,500	25%
Business	$ 6,000	20%
General Public	$ 9,000	30%
Total	$30,000	100%

The Peace River Indoor Pool Society broke down its campaign goal by category of funding sources and the percentage it hoped to collect from each.[11] The targets (and actual amounts) are below.

	TARGET		ACTUAL	
Alberta government	**$1,000,000**	**50%**	**$ 500,000**	**23%**
Regional municipalities	**$ 399,000**	**20%**	**$ 897,000**	**41%**
Wage subsidy programs	**$ 250,000**	**12%**	**$0**	**0%**
Voluntary Contributions	**$ 351,000**	**18%**	**$ 692,000**	**31%**
Misc.			**$ 117,000**	**5%**
Total	**$2,000,000**	**100%**	**$2,206,000**	**100%**

Formula Basis

A formula might be useful if it is important to be consistent and treat all donors equally. For example, if you plan to approach municipalities to support a regional project, your formula may be $1 per capita. That way, the larger municipalities would pay proportionately higher rates. Other possible formulas include:

- Businesses - $x per employee
- Hospitals - $x per bed
- Community groups - $x per member

Whatever formula you choose, apply it consistently to similar donors - and be prepared to explain it.

Standards Chart

Another approach is to set a "standards chart." This approach assumes that not all sponsors have the same ability to pay. The standards chart lists the number of contributions at various levels. For example, if you have targeted $10,000, your standards chart could look like this:

Contributors	Amount	Total
1	$1000	$ 1,000
2	$ 750	$ 1,500
3	$ 500	$ 1,500
4	$ 250	$ 1,000
100	$ 50	$ 5,000
110	$2550	$10,000

You then determine whom to approach for a $1,000 donation, two $750 donations, and so on.

Targeting your goals is not an easy process and involves a lot of guesswork and forecasting. However, if you are basing your targets on what you need and what the donor can realistically be expected to contribute, you will be fairly accurate.

Who? Assigning The Tasks

You now have a list of donors that you need to approach and activities and special events to plan. Identify who will carry out what tasks.

SET UP SUB-COMMITTEES

One way to get the job done is to assign it to committees. If you develop your committee structure based on your strategy, your fundraising committee could have several sub-committees:

- Foundations and government sub-committee
- Local community groups and municipal council sub-committee
- Businesses and institutions sub-committee
- Special events sub-committee

Each sub-committee chairman would be responsible for the appropriate target within the strategy. They would meet regularly with the fundraising chairman to report on activities and evaluate progress.

RECRUIT VOLUNTEERS

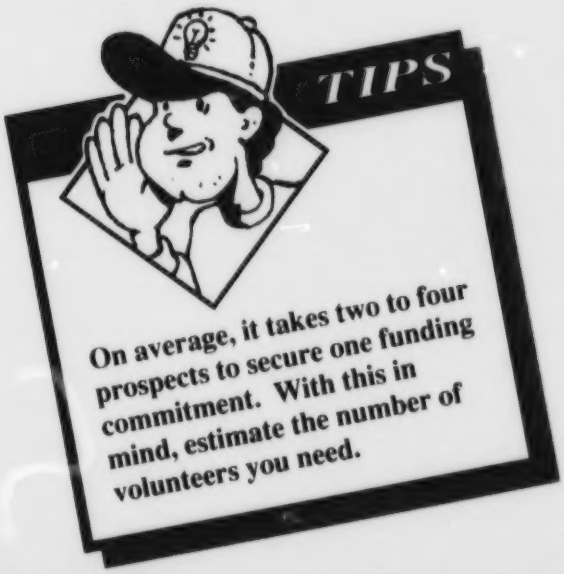
Volunteers are an essential component of your strategy. They are the key to the

success of your project.[12] According to a northern fundraiser interviewed in Fort Vermilion, "It is the people who really make it work."

Identify Potential Volunteers

There are a number of places to look when enlisting the support of volunteers:

- People associated with your organization now or in the past, such as:
  - Officers, committee chairmen, directors
  - Members, newsletter recipients
  - Those who benefit from the funds you raise
- People associated with other organizations, such as:
  - Service clubs
  - Church groups
  - Schools
- Anyone's and everyone's:
  - Friends
  - Families
  - Relatives


TIPS
On average, it takes two to four prospects to secure one funding commitment. With this in mind, estimate the number of volunteers you need.

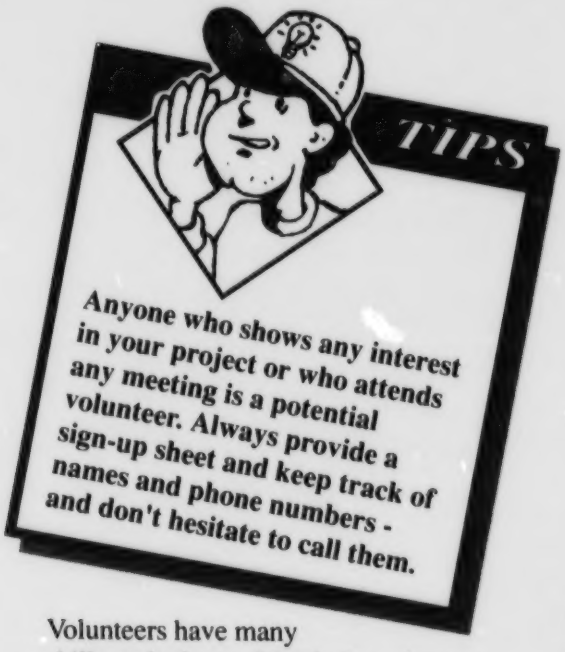
- Children - Almost any kind of campaign can have a children's division, for example in bottle drives or door-to-door sales.
- Seniors and elders - They are a ready source of manpower, providing expertise and experience.
- "Fine Option Program" for volunteer help such as stuffing envelopes or helping out at events. You will need to provide good supervision. Contact a local courtworker for information (community service in lieu of fines).

In selecting new recruits, enlist only those who are responsible and are known for following through on their commitments. Recruit volunteers based on their particular abilities, interests, and personal and professional contacts.

Motivate Them to Join

Before you approach an individual to assist on your project, think about what would motivate someone to volunteer. People get involved for a number of reasons; try to appeal to one of the motivators:

- To help others
- To learn and grow
- To make new friends, socialize
- To develop and use new skills
- To gain experience
- For career advancement
- To belong to a group
- To get involved


TIPS
Anyone who shows any interest in your project or who attends any meeting is a potential volunteer. Always provide a sign-up sheet and keep track of names and phone numbers - and don't hesitate to call them.

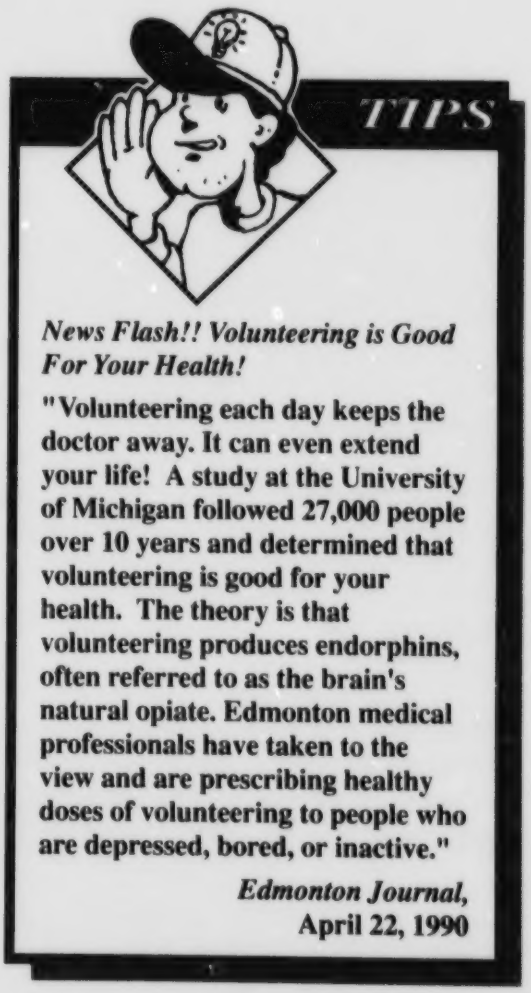
Volunteers have many skills and talents. Match the volunteer talents and resources to the tasks. Find out about previous work experience, hobbies, interests and education. Ask what they would like to do and what they are willing to do. Use the specific skills and interests they have to determine the most appropriate role for them. Don't assume that because the person is a newspaper reporter he or she will want to write all the news articles. Volunteers sometimes prefer tasks completely different from their regular day-to-day activities.

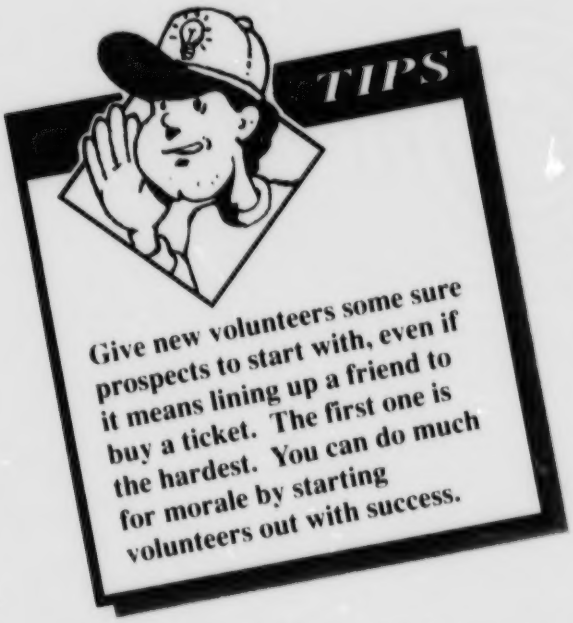
When you approach a prospective volunteer, enlist him or her to do a "task" as opposed to "join a committee". People like to have a defined and limited job. You may even want to provide a job description of four to five items along with a timeline.

Be sure to create authentic involvement. The best way to develop a sense of importance in people is by inviting them to do something important. They will become "insiders" and have a greater stake in the outcome of the project.

Volunteers also have many resources. Be sure to check if they:

- Own a computer, typewriter, adding machine


TIPS
News Flash!! Volunteering is Good For Your Health!
"Volunteering each day keeps the doctor away. It can even extend your life! A study at the University of Michigan followed 27,000 people over 10 years and determined that volunteering is good for your health. The theory is that volunteering produces endorphins, often referred to as the brain's natural opiate. Edmonton medical professionals have taken to the view and are prescribing healthy doses of volunteering to people who are depressed, bored, or inactive."
Edmonton Journal,
April 22, 1990


TIPS
Give new volunteers some sure prospects to start with, even if it means lining up a friend to buy a ticket. The first one is the hardest. You can do much for morale by starting volunteers out with success.

- Have access to a photocopier, fax or government RITE line
- Can get anything wholesale
- Have friends or relatives who might want to help

Then, based on the information, assign jobs. Outline the task, the goal, the timeline and expectations.

Volunteer Training

Your volunteer today could be your leader tomorrow. Help your volunteers develop the skills and confidence they need by providing training sessions which will give them an opportunity to:

- Increase their knowledge of the organization, such as its history, purpose, goals
- Understand the campaign goals and plans
- Contribute their ideas and ask questions
- Develop the necessary skills
- Get to know each other and develop team spirit

Your training session could be a short meeting, or an opportunity to review procedures for a door-to-door campaign and role play some possible scenarios.

When? Setting The Timelines

Setting timelines for a project like this is never easy. The strategy is complex and involves many people. As well, there are plans within the plan, making everything even more complicated. For example, the plan and timelines for a special event, such as a car wash, must fit within the timelines of the overall fundraising plan.

The most common mistake fundraisers make is to underestimate the amount of time needed for a project. It can take several months to pull together the information needed for a proposal; grant programs can take up to a year for a decision - and longer still to dispense the funding. Nothing will happen overnight, so plan for the worst.

Sometimes, there are predetermined deadlines already imposed on a project, for example, if the government proposal must be in by May 25. It is easier then to work backwards from the deadline to the present date, allowing enough time at the end for finishing touches.

Make a list of everything that needs doing. Break the jobs into manageable parts and then put the list of tasks in order. Estimate the time needed to do each item - and then double it. The following shows examples of two tasks and their respective timelines.

SAMPLE FUNDING TIMELINES[1]

	Lobster Dinner Event	**Foundation Application**
JANUARY	• Form committee • Prepare budget • Set ticket price • Set date	• Investigate possible funders • Define project
FEBRUARY	• Find space • Recruit volunteers • Print and distribute tickets and posters	• Carry out research
MARCH	• Publicize event	• Complete research • Phone foundation
APRIL	• Prepare food • Set up space	• Submit concept paper
MAY	• Clean up	• Refine proposal
JUNE	• Send out thank you letters to volunteers, sponsors • Re-convene committee to conduct evaluation of event	• Submit final proposal
JULY	• Prepare evaluation report	• Follow-up call • Negotiation process
AUGUST		
SEPTEMBER		• Final decision • Write thank you letter

Sharing Your Plan First Without Asking For Money

Before you implement your plan, you would do well to "test the waters" and get an accurate reading of the plan with your donor community. Share the plan in an informal setting with community leaders. Allow time for feedback, reactions, questions and discussion. By using this process, you can find out what others in the community think of your organization, its plans and what concerns and problems you may have to deal with. There is also a spinoff benefit in cultivating relations with donors by involving them.

It is important for the leaders you meet with to know you are not asking for money but rather are asking for their input. For example, you may say, "We are not seeking a commitment, but I need your opinion on whether these goals can be achieved. Would you see the businesses in our community giving donations in these amounts?"

Conducting a review of this nature contributes to the success of a project. You need to hear from the people who can make it work. If you give prospective donors an opportunity to tell you what they want, listen to them and respond to their interests, you will be in a position to develop in them a sense of commitment and involvement in the process.

CASE STUDY

"Grassland Community Centre"

Find out how one community raised $150,000 by carrying out a successful fundraising campaign.

See Case Studies at the back of the Handbook.

Swing Into Action... Launching Your Campaign

ASK AND YOU SHALL RECEIVE: APPROACHING DONORS 50

The Personal Touch: Approaching potential Donors in Person 51
- Make the Initial Contact
- Prepare for the Meeting
- Make Your Request
- Follow it up

Put it in Writing: Effective Proposals 55

Your Presentation: Make it Professional 58
- Content
- Delivery

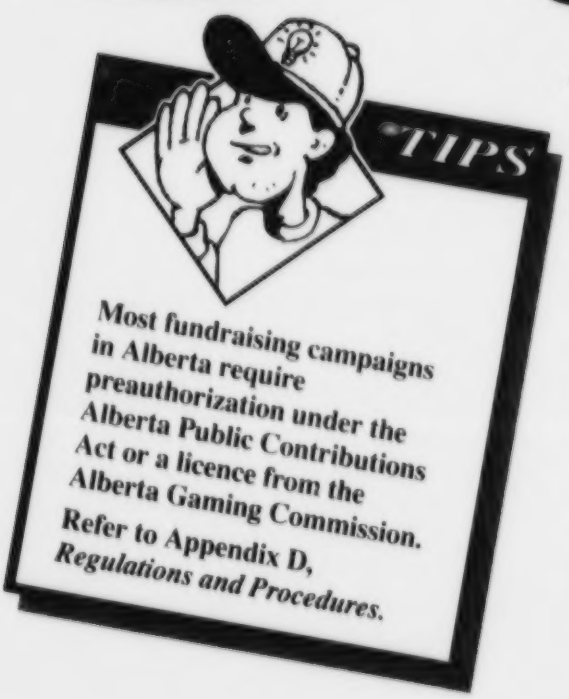
The Direct Approach: Canvassing 61
- Door-to-Door Canvass
- Telephone Canvass
- Direct Mail

Handle Questions Effectively 63

ORGANIZING SPECIAL EVENTS AND ACTIVITIES 64

PUBLICITY: TELLING THE WORLD 66

Swing Into Action... Launching Your Campaign


TIPS
Most fundraising campaigns in Alberta require preauthorization under the Alberta Public Contributions Act or a licence from the Alberta Gaming Commission.
Refer to Appendix D, *Regulations and Procedures.*

If your plan answered the who? what? when? where? and why? of your fundraising campaign, this section will answer the how? This is the fun part - actually raising the money.

As you have identified in your strategy, you will probably be trying to raise money in one of two ways:

- Approaching donors for contributions
- Organizing special activities and events

Ask And You Shall Receive: Approaching Donors

There are a number of ways to ask for a contribution from a potential donor. The most common approaches include:

- Personal meeting
- Written proposal
- Group presentation
- Canvassing - Door-to-door, telephone, direct mail

The most effective approach depends on the potential donor. Use the following chart as a guide to determine the most appropriate method.

	Personal Meeting	Formal Proposal	Group Present.	Canvass
Community Group	yes	no	yes	no
Service Club	yes	no	yes	maybe
Local Business	yes	no	no	yes
Local Institute	yes	maybe	maybe	no
Municipal Gov't.	yes	maybe	yes	no
Foundation	maybe	yes	maybe	no
Corporation	yes	maybe	maybe	no
Prov. /Fed. Gov't.	maybe	yes	maybe	no
General Public	no	no	no	yes
Members	no	no	no	yes

Note: Even if a proposal is not required for a specific donor group, written information of some type should still be provided.

When approaching any potential donor, try to anticipate what would motivate that person to give. The Fairview College Foundation has a motto: "*We* don't have needs; the *donor* has needs." The secret is in identifying what those needs are.

Some factors have been identified as motivators to donate to a cause.[14] Aside

from the more obvious motivators, such as being asked and being financially able to contribute, others include:

- Altruism - People have a sincere desire to help other people.
- Acceptance - People generally want to belong to a worthwhile group or organization; if they give, they gain acceptance.
- Group support - People wish to belong to or be identified with a group or organization they admire.
- Belief in the cause.
- Power and influence - Giving to a worthy cause satisfies a need for a sense of personal power in many people.
- Appreciation of an organization - People wish to support the services of an organization from which they have benefited.
- Income or estate tax benefits.
- Recognition - People like the public recognition that comes from making a large donation, such as their name on a plaque.
- Fun/Satisfaction - It feels good to give.

THE PERSONAL TOUCH: APPROACHING POTENTIAL DONORS IN PERSON

The most effective method of fundraising is to meet the potential donor face-to-face and present your case. This is the same whether you are approaching the president of a major corporation, your local MLA, the proprietor of a small business or a local resident. There are four steps to approaching a potential donor in person:

1. Make the initial contact.
2. Prepare for the meeting.
3. Make the request.
4. Follow it up.

Make the Initial Contact

Making the initial contact with selected potential donors can occur in a number of ways.[15]

The most effective way is through a personal connection, often referred to as the "Old Buddy" network. This is where board members come in. Some members will have contacts in the business community; they can directly approach company presidents or executives *or* recruit other members of the business community to approach companies on your behalf. These "contacts" can either solicit a contribution directly or arrange for a meeting between the fundraising committee and potential donor.

A phone call to the person in charge is also effective.[16] It isn't always easy to get through to the top, however; the key is to be assertive and sound authoritative. When you do get that individual on the

TIPS
You must be quick on your feet during the phone call. Prepare yourself by rehearsing your lines and anticipating possible responses.

phone, convince him or her to meet with you. Explain why the company should be interested in what you are doing and how it can benefit from meeting with you.

If the individual offers a donation during your call, be appreciative. However, it is still in your best interest to meet in person and present your case - this will be more effective in establishing a relationship with the donor and will perhaps develop a deeper and more long-term commitment. Be persistent.

If you can't get in to see the person in charge, deal with the individual who handles donations. Find out where your request for funds should be addressed. Get the person's name and title. Write a short, one-page letter introducing your organization and explaining your desire to meet to discuss your project. Say you will call in a few days to arrange a meeting.

Prepare for the Meeting

Once you have the meeting appointment, take time to prepare.

- Decide who should go to the meeting.

  It is best to have two or three people representing the organization. If possible, select someone from your group who has some relation to the prospective donor, or is a peer or colleague of the donor.

- Decide who will present information.

  The leader opens the meeting and provides an overview of the organization. The presenter assists the leader and may discuss one or more issues or aspects of the project.

- Anticipate potential questions - and possible answers.

  Consider role playing possible scenarios. Refer to page 56 on developing a presentation.

- Review material you have on the donor.

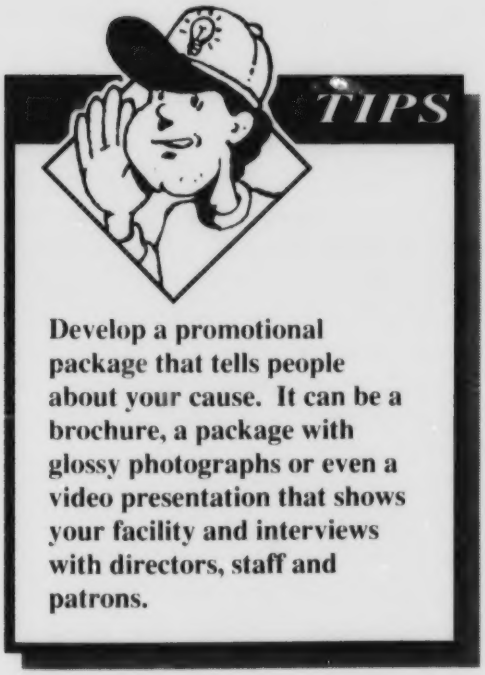
  The annual report, office files and correspondence are sources of information on the organization. The prospect will be impressed if you show thorough knowledge of his or her operation.

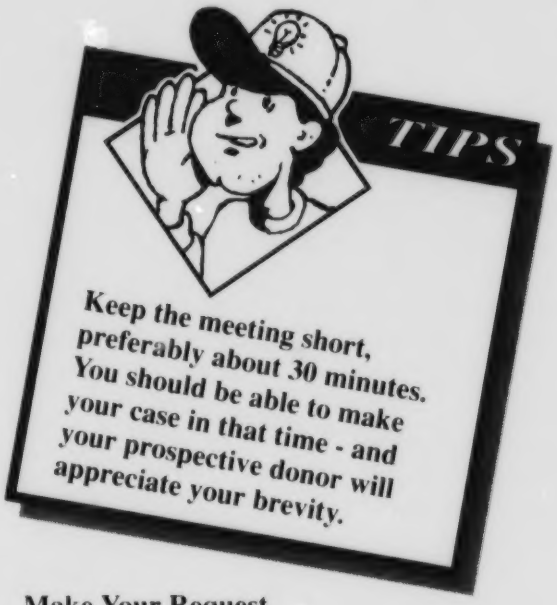
- Know any history your organization has had with the donor.

If you have received funding previously, know when, how much and what it was used for. It would be particularly useful if you had some idea of the company's policy regarding donations to community groups and which ones it may have already financially supported locally.

- Prepare information to hand out at the meeting.

  Gather a brochure, fact sheet or annual report. Draft a cover letter to leave noting the amount of funding you are requesting, your rationale and the summary of your need for support.


TIPS
Develop a promotional package that tells people about your cause. It can be a brochure, a package with glossy photographs or even a video presentation that shows your facility and interviews with directors, staff and patrons.


TIPS
Keep the meeting short, preferably about 30 minutes. You should be able to make your case in that time - and your prospective donor will appreciate your brevity.

Make Your Request

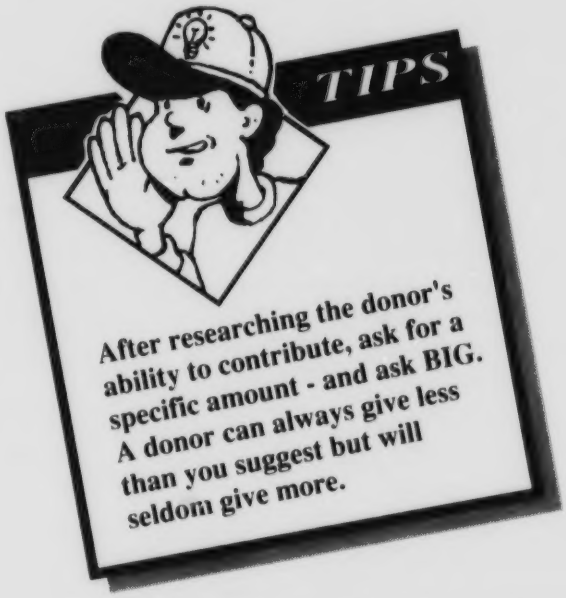
At the meeting, introduce yourself and your partner and begin the discussion.

- Ask if he or she is familiar with your organization.
- Give an overview of your organization, briefly explaining its purpose and history.
- Describe your project and address any questions.
- Make a request for a contribution, focusing on:
  - the organization and its reputation
  - the need and the fact that the money will be put to good use
  - the amount asked for and its rationale
  - other contributors who have donated
  - the benefits of donating, such as publicity, recognition, public relations
  - how the contribution will be recognized
- Leave written information.

The donor may be unsure about making a contribution to your organization. Rather than pressing for a decision which may be negative, allow time to think about it. Leave some information and set a time to meet again.

If the company you approach has a head office outside your area, not only will the local manager have to be persuaded of the merits of your project, but he or she will also have to present the case to company superiors. If you have the support of the local branch, work closely with it to develop a case. You may have to focus on the public relations spinoff the company will get from donating in the community where it operates.

In some cases, the prospective donor may want to negotiate the amount of funding you are requesting. You could accept something less, but remember that each gift sets the pattern for donating. In the event of a lower counter-offer, you have four options:[17]


TIPS
After researching the donor's ability to contribute, ask for a specific amount - and ask BIG. A donor can always give less than you suggest but will seldom give more.

- Present a higher counter-offer, re-emphasizing the rationale.
- Suggest options. Would the donor:
  - Provide in-kind goods or services to supplement the cash donation so it will still total the original amount?

A Fundraising Story

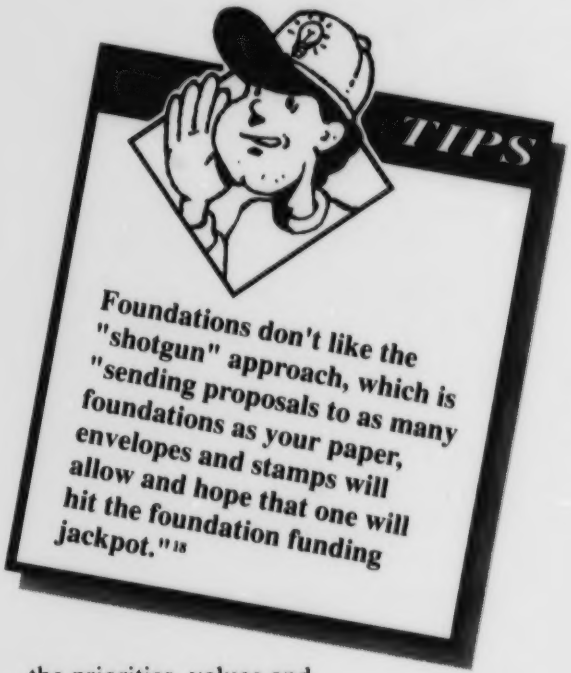
Once there was a group that wanted to raise money for a very worthwhile community project. Two dedicated volunteers approached the local bank to request a donation in the amount of $1,000. The bank officer they met with was extremely supportive, saying he was very impressed with the organization and its accomplishments. He would be happy to make a contribution of $50. Without blinking an eye, the dedicated volunteer responded, "Thank you very much, but may we consider this amount as your personal contribution? We still would like to talk about the possibility of a $1,000 donation from the bank." The team walked out of the bank with two cheques. And they lived happily ever after.

- Provide options for payment, such as pledging a certain amount per month?
- Implement a matched contribution program or payroll deduction plan?

• Accept the offer and hope it will increase next year.

• Refuse the offer on the grounds that it will undermine the overall fundraising effort.

Your organization may want to discuss the possible scenarios in advance of approaching donors and agree upon a common response.


TIPS
Foundations don't like the "shotgun" approach, which is "sending proposals to as many foundations as your paper, envelopes and stamps will allow and hope that one will hit the foundation funding jackpot."[18]

Follow it Up

After the meeting, summarize the main points, questions and concerns that were discussed. Keep a record of these in your files.

Send a short letter thanking the prospective donor for meeting with you and re-state what your group does, why you need the donation and how much you need. Answer any questions you weren't able to respond to at the time. Also, add any new, relevant information.

PUT IT IN WRITING: EFFECTIVE PROPOSALS

The key to a successful proposal is to target it to a specific sponsor, donor, government program or foundation. Tailor each proposal, taking into account the priorities, values and wants of the funding body. Establish a personal relationship in advance of developing your proposal. This allows you to verify the donor's priorities, to get some tips and suggestions to aid in your work, and to determine the preferred format.

To write the proposal, review your case and know:

• Why the project should be done

• Why it has not been done already

• How it will be done

• How long it will take

• How much it will cost

• Who will do the work

• What the end product will be

Why do proposals get funded?

- **Identifiable need**
- **Sound organizational capabilities**
- **Deliverable product**
- **Good management**
- **Reasonable budget**

You must include information on the need, the project, the results and the budget in any proposal. Appendices can provide supporting documents.

The following outline provides a point form review of the type of information you should include in your proposal.[19]

PROPOSAL OUTLINE

A. TITLE PAGE

- Identify the project or program title.
- Note the name and address of submitting organization.
- Note the name, title and address of project director.

B. TABLE OF CONTENTS

C. PROPOSAL SUMMARY

- Summarize the key points of your proposal, such as the need, the project objectives, timelines, the budget and the contribution request.

D. INTRODUCTION AND BACKGROUND

- Discuss the need and related issues.
- Show your need in relation to other social issues and how it is relevant to many people.
- Describe what others have done to address it and why your project presents a viable alternative.
- Explain who your group is and why it is the best one to address the need. Outline your previous activities and accomplishments, experience and resources.

E. THE PROJECT DESCRIPTION

- Describe your response to the need.
- List the goals and objectives. Keep your objectives clear and measurable.
- Identify your approach/methodology for accomplishing the objectives.
- Break down the tasks to be carried out and provide timelines in days/weeks.
- Detail the organization and management of the project.

F. ANTICIPATED RESULTS

- Describe the end product.
- Explain how you will evaluate the product when it is complete.
- Set a goal and make a commitment to sponsors.

G. BUDGET

- Summarize the budget.
- Provide a detailed breakdown and justify your costs, e.g., attach supplier estimates.
- List all funding sources you've approached or will approach and the target goals you are aiming for.

H. ORGANIZATION DESCRIPTION

- List names and addresses of the board of directors.
- Include details on the organization, such as:
  - History of the organization
  - Audited financial statement
  - Size of membership
  - Area of membership/service
  - Society status and charitable donations number
  - Bylaws.
- Enclose your annual report and any organization brochures.

I. APPENDICES

- Attach supporting documents, such as terms of reference, feasibility studies, designs and survey results.
- Include resumes of key personnel.
- Attach minutes of any pertinent meetings, particularly if motions were made regarding the project.
- Attach letters of support.
  - Supporting letters are beneficial if they are directly related to the specific project.
  - Letters from your MLA and MP are valuable.
  - If you have a project regional in nature, letters from the area will carry a lot of weight.
  - If your project could be controversial, a letter of endorsement from a respected authority in the field will provide you with credibility.
- Review past funding history and results with the sponsor.
- Include any newspaper articles and make reference to television or radio coverage that supports your case.
- Identify bibliography/reference material.

Proposals take a lot of time and energy to develop, particularly when each one is tailored to a specific sponsor. If eligibility for funding from a potential donor is in

doubt, send a letter, letter-proposal or pre-proposal first.

- A letter states that you are considering a campaign, how much money you need and why. It asks if they will consider receiving a detailed proposal from your group.

- A letter-proposal, two to three pages long, outlines the purpose of the request, the problem to be addressed, and the approach to be taken.

- A pre-proposal is a highly abridged version of your full proposal. It is sometimes referred to as a "concept paper".

Sending a letter, letter-proposal or a pre-proposal saves everyone work. Potential funders benefit because they can quickly review it and determine whether they are interested in receiving a full proposal. Your organization benefits by making more efficient use of its time.

YOUR PRESENTATION: MAKE IT PROFESSIONAL

Often during your fundraising effort you will have to verbally ask for funds. This is very common, particularly when approaching community groups such as:

- Municipal councils
- Chambers of commerce

TROUBLESHOOTING GUIDE

WHAT IF...

The foundation you apply to denies your request?

THEN...

- **Contact the foundation to try to get more information:**
  - **Find out why you were unsuccessful. Many will provide comments on your proposal which can be very useful for next time. Be sure to have a positive attitude and try to learn from their views.**
  - **Do they need additional information?**
  - **Would they consider another application at another time?**
  - **Could they suggest other sources of funding?**
- **Stay positive. Usually it is not the project's merit but rather high competition and limited funding.**

- Service boards
  - FCSS boards
  - Recreation boards
  - Agriculture boards
- Other non-profit groups
  - Kinsmen
  - Lions
  - Rotarians
  - Church organizations

The quality of your presentation often determines whether or not you receive the contribution you are requesting. Your success will depend on three aspects:[20]

- Fact - Your ability to present solid information and logical arguments
- Emotion - Your ability to get your listeners excited about your cause
- Credibility - The extent to which you are viewed by your audience as honest, believable, and trustworthy

It will be through your *content* and *delivery* that you will gain support for your project. Any member of your group can present the facts of your project in a public presentation. But it will be the more experienced, polished speaker who will be able to speak with enthusiasm and confidence.

"Our presentations were successful because:

- **We selected presenters who were comfortable with speaking, such as lawyers and members of Toastmasters.**
- **Presenters were given all the information they needed to make well-informed, consistent and convincing presentations.**
- **A bound proposal was left with the audience which contained all of the critical information.**
- **Presentations were scheduled after all of the information was gathered."**

Peace Indoor Pool Society, Peace River

Content

Your arguments must be convincing. To be persuasive, you must convince your audience that your interests coincide with theirs. Thus, as you prepare your presentation, think in terms of your audience's self-interest and not your organization's.

The way you plan your presentation depends on your audience. Consider their occupations, education, interests, knowledge of your group and project, and the opinions they may already hold - favorable, undecided, opposed. How you approach a group of mothers at a Mom's

Morning Out Club will differ significantly from how you would approach a Rotarian luncheon.

The following is one way to structure your message:[21]

1. Gain their attention

   Your opening should seize the attention of your audience, direct that attention toward your topic, and make them sit up and take notice. An emotional fact or a real life story can be particularly effective. Some openers include, "Three out of five people in this room will die of heart disease," or, "I've got an idea that will..."

2. State the need

   Explain the problem and show the listeners why it is important to them. You will want to include facts, anecdotes and examples to describe the need and build a logical foundation for your proposed solution.

3. Present the solution

   Explain your proposal clearly and show how it meets the need. You may want to present opposing views and explain why yours is the better one. It is more effective to present the counter-arguments yourself and deal with them in your presentation than have them come up later.

4. Show the future

   In order to really gain audience support of your position, take them into the future. Show what positive things can happen if your project takes place; also show them what might happen if your project does not go ahead. Use vivid description and strong word pictures.

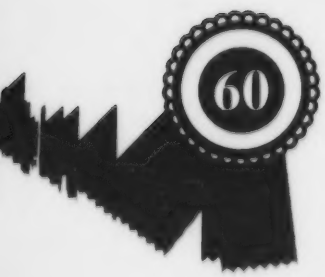
5. Encourage action

   Your final step is to get action from your audience. Ask them for their support, for a letter of endorsement, for a cheque for $100. If you have gained their commitment you will achieve your goal.

Delivery

The content of your presentation will be lost if your delivery detracts from the message. *How* you say it is as important as *what* you say. Keep some of these pointers in mind:

- Speak with directness and conviction. If you don't believe it no one else will.
- Be enthusiastic. Get excited about your project.
- Use lots of eye contact. It helps you to establish rapport with your audience.
- Avoid the use of notes. They will distract your audience and limit your eye contact.



- Use audio-visuals when you can. Charts, graphs and overheads reinforce your message and keep your audience interested. Make sure whatever you use is large, clear and legible.

- Keep your presentation short and to-the-point. You will make a bigger impact if you leave them wanting more instead of overstaying your welcome.

It is important to allow time for questions, comments and feedback during your presentation. See page 61 on how to handle questions.

THE DIRECT APPROACH: CANVASSING

Door-to-Door Canvass

Canvassing is one method that reaches the whole community in an appeal for contributions.

- Organization is essential
  - Appoint a coordinator.
  - Recruit field workers to supervise five to 10 canvassers each.
- Do the preliminary groundwork
  - Obtain a canvassing permit from Alberta Consumer and Corporate Affairs. (See Appendix D.)
  - Determine the specific boundaries of the area to canvass and divide it into realistic sectors of about four blocks.
- Compile material
  - Develop training material for the canvassers, including a fact sheet with information on the organization explaining its history, purpose, accomplishments, goals.
  - Draft a sample presentation for canvassers to practise.
  - Develop packages for each canvasser, including clipboards, brochures to leave with residents, receipt books, pledge forms, reply envelopes, name tag/identification badge, map of their area.
- Recruit and train volunteers
  - Select volunteers who are informed and enthusiastic.
  - Orient the volunteers and allow them an opportunity to role play possible situations which would include stating their name, organization, a brief statement about the project, and making the request for a donation.
- Carry out the canvass
  - The best time to canvass is Monday to Friday between 4 p.m. and 9 p.m.
  - Select a block of time to do the blitz, such as a two-week period.
  - Visit all homes once; if no one is home on the second visit, leave a brochure and letter requesting support.
  - Have canvassers turn the money in to the field managers.

- Follow-up
  - Deposit the money regularly.
  - Record the addresses of the contributors.
  - Write thank you letters to all contributors.

Telephone Canvass

A telephone canvass follows the same process as the door-to-door except that the request is made over the telephone.

Volunteers are recruited, provided with training and given names and telephone numbers of potential donors. The list of phone numbers is generally selected from a telephone book or from any membership list (see below on mailing lists). It could represent a sample of local residents or target a professional group such as lawyers, accountants and physicians. The volunteers phone from their own homes or from a central office.

Direct Mail

Direct mail is soliciting funds from individuals you don't know by sending a letter in the mail. It produces quick results - you should know in two to three weeks how successful you have been as 75% of the responses will usually be returned within three weeks. Follow these steps:

- Develop a strategy
  - Direct mail works best for projects that are specific, high profile, easily explained, and understood by the general public, e.g., saving baby seals, abused children.
  - The best time to carry out a direct mail campaign is between September and November; February to June is the second best.

- Develop a mailing list
  - Identify target groups that are sensitive to the issue and can afford to contribute. For example, a mailing list to help abused children would target parents, single parents and women and would include PTA members, women's club lists, church groups.
  - Develop a mailing list by circulating a sign-up sheet at meetings, tracking those who purchase your products or services, or borrowing lists from other local organizations.

- Prepare the package
  - Include a cover letter that is personalized and personal. Be clear and simple about your project and how the money will be used. End with a request for a donation.
  - Include a reply card; this allows the donor to say how much he or she is contributing. Keep track of the

responses by geographic area, and if possible, by gender and age. This will help you to target certain groups next time.

- Enclose a self-addressed envelope, pre-stamped if you can afford to. For large mail-outs, you can obtain a bulk rate from Canada Post. Call your local post office for details.

The direct mail campaign can be expensive in material and labor and requires an initial investment before you see any return. However, direct mail can be very effective when used the right way by the right group for the right issue and is especially suitable to carry out on an annual basis.

HANDLE QUESTIONS EFFECTIVELY

Regardless of how you approach a potential donor, there will always be questions. The key to addressing these is to be prepared. Anticipate possible queries and plan well thought-out responses.

Below are some questions that are frequently asked by potential donors:[22]

- Exactly what is the purpose of your organization?
- What proof do you have that your group provides a real service? What have you accomplished?
- How does your organization compare to similar ones in this area?
- Will you be expanding your services in the near future?
- How many people do you serve?
- What is the cost for serving each person assisted by your organization?
- What percentage of the money you raise actually goes to the cause you raised it for?
- What is the relationship of your staff size to the number of people served?
- How are you growing and improving?

The fundraiser who knows the answers and brings up the question before it is raised will impress the potential donor.

At some time, you may be challenged and faced with opposition. Maintain strong eye contact with the individual who voices the objection and try to respond positively. If you're doing a presentation and an individual is being difficult, ask him or her to meet with you afterwards to further discuss it then. Under no circumstances show defensiveness or anger.

Organizing Special Events And Activities

Special activities and events offer a full range of fundraising options and can be grouped into the three main types, noted below with examples. A more complete listing of ideas is in Appendix B.

- Sales
  - Auctions
  - Raffles
  - Door-to-door
- Events
  - Casinos
  - Fashion shows
  - Sport tournaments
- Services
  - Babysitting
  - Car wash
  - Costume rentals

CASE STUDY

"Peace Indoor Pool Society: Art Auction"

The Pool Society raised $13,000 by organizing a successful Art Auction. Find out how in the Case Study at the end of the Handbook.

Holding events serves a vital function in raising the profile of your project. While each one is necessarily different, there are similar steps to follow in organizing them.[21]

ORGANIZE YOUR COMMITTEE

Appoint a chairman to organize a special events committee. It is most effective if the chairman recruits his or her own committee members as this allows the selection of people who work well together. It is useful to approach a local individual who has carried out a special event to act as a resource person; a service club member would be a good choice.

CHOOSE THE EVENT

Select an event which is matched to:

- Your resources
- Your organization
- Your community

DRAW UP A BUDGET

Determine how much money you need up front and project your overall income and expenses.

CHOOSE THE DATE

There are a number of things to consider in setting the date:

- Season
  - Spring or fall are the best times.
  - Some seasonal holidays can be used as themes, e.g., Hallowe'en, Valentine's Day. However, others such as religious holidays, are best avoided.

- Day of the Week
  - Weekends tend to be the best.
- Conflicting Events
  - Check around the community to see what else is scheduled for that date. A community calendar or events calendar can provide useful information.
- Time needed to plan
  - Allow enough time to carry out the planning needed for your event.

ARRANGE A LOCATION

Select a location that meets all your needs. Consider such points as:

- Size - Is it large enough?
- Location - Is it central, accessible?
- Parking - Is it available, reasonable?
- Restrooms - Are they available? Are there enough?
- Kitchen facilities - Are they suitable?
- What will it cost - Can you get it free?

PLAN TASKS AND TIMELINES

Define all tasks involved in carrying out the project successfully. Chart everything that is needed to bring off the event. Some of the more common items include:

Personnel
- Cashiers
- Waiters/waitresses
- Ticket takers
- Clean up people
- Security

Items
- Equipment
- Cash box
- Receipt book
- Table cloths
- Sound system

Printing
- Tickets
- Programs
- Posters
- Invitations

Publicity
- Invite media
- Advertise in the newspaper, on radio
- Hang posters

Regulations
- Insurance
- Licences/permits
- Fire regulations

SETTING THE PRICE

Calculate how much to charge by adding together the amount of money you want to raise with the cost of the event. For example, if you need to raise $500 and your event is going to cost you $200, you

TIPS
Run through the event in your mind, visualizing it from the beginning to the end. Try to think of all the details that need to be looked after.

will need to gross $700. Divide $700 by the number of tickets to get a ticket price. Also, think about:

- What similar events have charged
- What other costs individuals incur to attend, such as babysitters, parking
- What else can bring in funds, such as a cash bar or a raffle
- Complimentary tickets you may want to provide to VIPs or media

KEEPING ACCURATE RECORDS

Keep track of all aspects of your event so the next time you will know about:

- Costs
- Suppliers
- Equipment
- Organizational charts
- Tasks
- Publicity
- Timelines

EVALUATE

Evaluate your event right after it is held to determine what was especially effective and what could have been done differently.

TIPS

Devise a checklist to review each activity.

Fundraising Activity: ***Car Bingo***

Anticipated Goal: ***$5,000***

Realized Goal: ***$1,000***

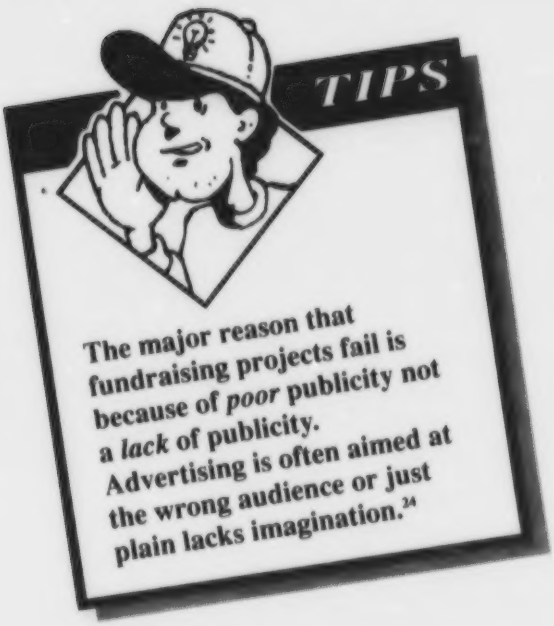
Why it was successful:
Many volunteers

Why it was unsuccessful:
Competing events

Areas for improvement:
- ***Check dates for other events***
- ***Better media coverage***
- ***More preparation time needed***

Publicity: Telling The World!

Making the public aware of your fundraising project or your special event is critical. You can't raise money unless people know about it - regardless of the amount of effort and preparation that went into it. Effective publicity requires a


TIPS
The major reason that fundraising projects fail is because of *poor* publicity not a *lack* of publicity. Advertising is often aimed at the wrong audience or just plain lacks imagination.[24]

commitment of time and finances and a well thought-out plan.

Assign one person to be in charge of publicity for your fundraising project. He or she should have the overall responsibility to get the news out and keep the public aware of your progress. (Special events or activities, such as dances or skate-a-thons, should have their own publicist.) The promotions person should make contact and establish relationships with local media.

There is a full range of options open to publicize your fundraising project. Unfortunately, many groups tend to focus on the standard method - newspaper. In a small community, the local newspaper is a key source of current information. However, it is not the only source. Using only one medium limits the type and number of residents you can reach; the more varied your approaches, the greater your opportunity to reach a wider segment of the population.

What are the promotional options you can use? Here are some of the standard approaches as well as some novel ideas.[25]

STANDARD APPROACHES

- **Local newspaper**
  - Newspaper advertising is inexpensive yet far-reaching.
  - Community announcements are often free-of-charge.
  - Ask donors to sponsor ad space and recognize them.
  - Publish announcements at least twice - once to inform and once to remind.

TIPS
Make contact with your local media to find out how best to take advantage of their services. Discuss your project and ask for support. Find out what you can do to make their jobs easier.

- **Radio**
  - Public service announcements are free.
  - Send your release at least two to three weeks in advance.
  - Keep your release brief (20 seconds), accurate, complete.
  - Contact station in advance to determine whom to send it to.
  - Consider more novel ideas, such as holding an open-line talk show or giving away free tickets on the air.

- **Television**
  - It is difficult to get coverage as a news item, but worth trying if your project is highly unique or interesting.
  - Community cable channels often print local announcements and some will show local videos.

NOVEL IDEAS

- **Letter, postcard**
  - Keep other local organizations informed by sending them announcements or letters, thereby reaching large numbers of key community leaders.

- **Posters**
  - Post them on walls, trees, windows, bulletin boards; obtain permission first.
  - Print them commercially or make them yourself; keep them professional.
  - Keep them simple and concise and include essential information such as type of function, date, place, sponsor, project.
  - Hang them two weeks before the function and take them down immediately after.

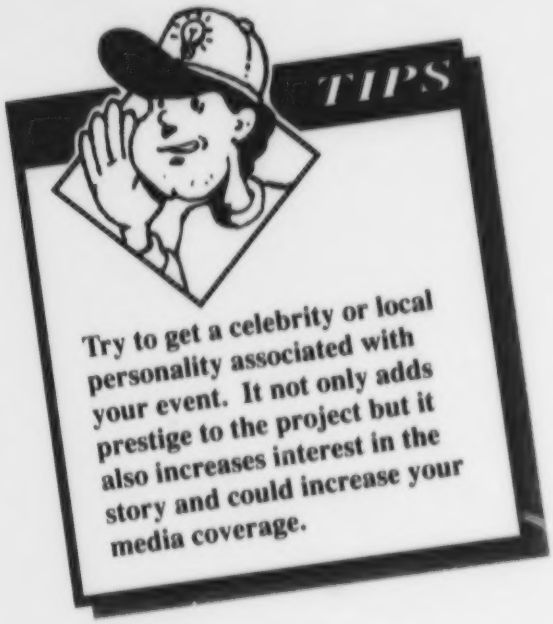
- **Handbills, flyers, brochures**
  - These are effective yet inexpensive.
  - They are often one sheet of photocopied paper.
  - They can be distributed door-to-door, in the mail, under windshield wipers, through retail outlets.
  - Approach a local business to sponsor your flyer. Or sell advertising on it. Identify those companies who may have a parallel target market and show them how they can benefit by being affiliated with your group.

- **Signs, banners**
  - These can be very impressive.
  - Make your own with a piece of oilcloth and large, bright colors. Cut strips in it to let the wind through.
  - Check with authorities before hanging them.

- **Window display, mall display**
  - These are free, effective.
  - Approach stores well in advance with a developed idea.

- **Car stickers**
  - These are expensive but good for a regular event, e.g., farmers' market.
  - Never stick one on a car without the owner's permission.

Use a variety of promotions to reach the largest number of people. Be creative. People today are inundated with information. The more interesting and unique your approach, the more likely people will notice. Take your time, use your imagination and have fun.


TIPS
Try to get a celebrity or local personality associated with your event. It not only adds prestige to the project but it also increases interest in the story and could increase your media coverage.

Keep Things Moving... Managing The Process

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Keep Things Moving... Managing The Process

As you move through the fundraising process and get caught up in approaching donors, holding events and managing volunteers, it is easy to get lost in the action. At some time, the group will want to stop, step back and take a good look at what is happening. You will want to:

- Verify that you are on target
- Evaluate your strategy
- Get re-motivated

Keeping On Top

Sometimes when a fundraising project is launched, things can happen very quickly. It can be difficult to stay on top when this occurs. The expression, "It just got away on us," can apply if there is not ongoing management of the process.

GET COMMUNITY FEEDBACK

To be successful, all people involved with the project must be aware of the community perception surrounding the campaign. Obtaining community feedback will give your organization valuable clues as to what is working, what isn't working, and what more needs to be done. There are several ways to do this.

Community feedback can be actively solicited by formally providing an opportunity for community members to share ideas and suggestions. Have a phone-in talk show on the radio or hold a public meeting or workshop.

The informal methods, however, can be the most important of all and can pay invaluable dividends to your project. Each member involved in the project should informally obtain feedback by regularly asking contacts how they perceive the campaign or if they have any suggestions.

KEEP THINGS MOVING

One key element in successful fundraising is to keep the project moving. Beware of any long periods when nothing is happening - or at least nothing *appears* to be happening. Of course, there may be a lot going on behind the scenes in reality, but this may be unknown to the public. The important thing is to build and never lose momentum. If a project "takes a break" for an extended period due to burnout, discouragement or even scheduling, just remember one thing - it will be considerably more difficult to build momentum later on. Part of the managing process is to ensure that some activity is occurring almost at all times. And, when there isn't an actual event being promoted or carried out, there should be media reporting on what *has* already taken place or what *will* happen in the future.

INTERNAL COMMUNICATIONS IS A MUST

It is essential to share all the feedback you receive on your campaign *regularly* and *often* with members of your board and committee. This committee "sharing and reviewing" function is a dynamic and ongoing process. Without it, your fundraising project can suffer greatly.

Regular communication is vital for a number of reasons:

- It keeps people up-to-date on the project's progress.
- It allows everyone to receive the same information.
- It provides an opportunity to work out disagreements.
- It can dispel rumors or prevent them from erupting in the first place.
- It helps to avoid internal disharmony.
- It sets the stage to improve your next fundraising activities.

Keeping The Project On Track: Review Your Fundraising Strategy

Your fundraising strategy should be a dynamic and evolving process. By keeping on top of activities and meeting regularly to review progress, you provide the proper environment to keep the project

well-organized and moving forward. As you manage the process, you will need to review how things are going and decide what, if anything, needs to be changed. Some plans will need to be moved ahead in time; others will have to be dropped.

Review the fundraising plan. What has altered since you started the fundraising activities? These changes should be discussed and reflected in a modified plan.

It is important to review the major aspects of your plan:

- Approaching potential donors
- Holding activities and events
- Working with volunteers
- Dealing with the media

REVIEW YOUR APPROACH WITH DONORS

As you review your donor plan, ask yourselves the following questions:

- What success are we having in our approaches?
  - From local organizations, institutions, businesses?
  - From corporations and foundations?
  - From municipal, provincial and federal governments?
- What goals have been reached in these categories?
- What is the total amount raised or committed?
- What work needs to be done?
- Who is going to do what?

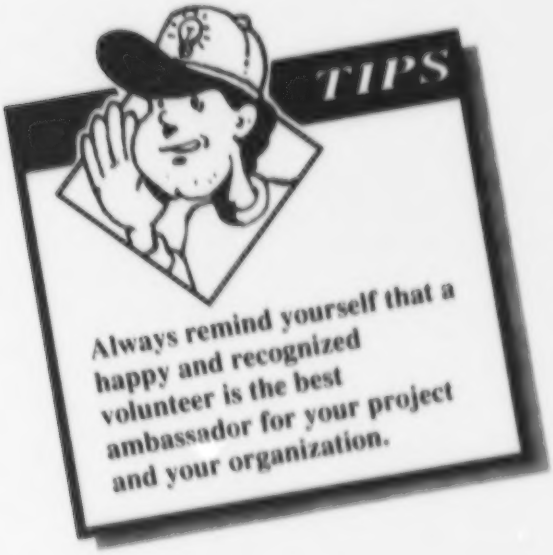
REVIEW YOUR SPECIAL ACTIVITIES AND EVENTS

It is vital to evaluate the success of each project or activity that has taken place or is presently underway in the community. Not every activity will fulfil all expectations. Some will exceed the objectives, others will fall short. Learn from each experience, from mistakes as well as successes. Ask yourselves:

- What activities and events have been carried out?
- What degree of success or failure is being experienced? Why?
- What recommendations can be made in:
  - Timing?
  - Visibility?
  - Cost?
  - Financial gain?
- Do new projects need to be planned?

REVIEW YOUR MANAGEMENT OF VOLUNTEERS

Volunteers are the heart of virtually all fundraising projects. Without them, you cannot succeed. It is absolutely critical to


TIPS
Always remind yourself that a happy and recognized volunteer is the best ambassador for your project and your organization.

keep them front and centre in everything that you do. It is easy to forget about the very people that can make or break your project unless you consciously strive to remember them.

Go back to your volunteer plan and monitor its success. If the volunteer aspects of your program are suffering, you are in danger of losing the very heart of your campaign. Consider:

- Are we attracting more volunteers?
- How many volunteers are involved? Do we have to recruit additional members?
- How are our volunteers being trained/used?
- Is the workload spread sufficiently so no one is overworked?

TROUBLESHOOTING GUIDE

WHAT IF...

You have some volunteers who are not working out?

THEN...

- **Review their tasks. Do they have skills in this area or are they over their heads? Take another look at their experience and try to match their skills with the tasks.**
- **Assign a co-partner. Match them up with others who are experienced and capable.**
- **Look at your organization. Have you created a positive climate of enthusiasm and confidence? You can't coerce people into performing but you should try to build a structure to channel the energies of your volunteers and bring out their best.**
- **Don't lose hope! Each volunteer is useful - it is just a matter of finding out what each is best suited for.**

- How has recognition been provided? Has it been effective?
- What other recognition can be provided?
- How are volunteers being kept informed?
- Have any problems arisen with the volunteers? Why?

Maintain ongoing contact with volunteers. You want to find out early if any are having trouble carrying out their responsibilities. Check on them or have them report to you every three or four days. Hold frequent meetings to maintain personal contact.

REVIEW YOUR DEALINGS WITH MEDIA

Review your dealings with the media and your overall publicity plan.

- What media have been informed of your ongoing project event?
- What media are covering the events?
- What media are not covering the events? Why?
- How effective is the coverage?
- What hasn't been covered? Why?
- Are there ways to improve the quality and/or quantity of the coverage?
- Have regular and informal media contacts been established?

Recognizing Your Contributors

Everyone who contributes to the success of your project deserves a big thanks. Both the donors and the volunteers deserve acknowledgement for their efforts and support. Reward and recognize them throughout the fundraising campaign - they need to know they are appreciated.

VOLUNTEERS

Don't wait until the end of the campaign to say thank you. Everyone needs continual recognition; never miss an opportunity to let your volunteers know they are appreciated.

- Let them know what a good job they're doing individually.
- Give out praise and compliments at meetings and in front of others.
- Give rewards and prizes for special effort, such as the most contacts made in a week or the most money raised. A certificate, a ribbon or even a chocolate sundae makes it worthwhile.
- Publicly recognize outstanding effort through the media. Have a volunteer of the week or month. This helps to keep your project in the limelight as well.

Ongoing recognition is essential in keeping up the morale of your volunteers and helps to ensure they will maintain their best efforts.

Volunteers are the lifeblood of most non-profit organizations. If they can come away from your project with a good experience, they are more likely to continue their volunteer efforts and develop into the leaders of tomorrow.

DONORS

As soon as a donation is received, it must be recognized. A personal letter should be signed by the president or someone equally appropriate and sent, with a tax receipt, on the same day. Try to be upbeat and unique in your approach. Compare the following two examples:*

- "We are in receipt of your recent donation for which we are very grateful. A receipt for income tax purposes is enclosed."
- "Thank you, thank you, thank you! You really made our day. We just opened your letter with that very important donation and called the whole office staff over to share the good news..."

Provide other forms of recognition for varying levels of contributions. A top level donor may be honored with a special luncheon or dinner. Or, he or she could belong to a prestigious "500" Club, for those who provided $500 or more. This could include an invitation to an annual dinner with the CEO. Provide an opportunity to have facilities, wings, or scholarships named for the donor. Recognition of donors should be immediate, visible and tasteful.

Thank donors more than once. Involve them in your organization. Invite them to regular functions, ask their opinions, send them information before others receive it. In general, treat them with great respect.

Keeping Community Perception Positive

It is important to ensure the community perceives the project positively. The community must believe in the end product or the purpose of the campaign. However, not all projects lend themselves to this positive view, at least not initially. For example, some communities may be skeptical about a day care proposal, a women's crisis centre campaign, or a detoxification program plan. Yet most communities positively perceive the need for a recreation centre, swimming pool or beachfront development.

Most community needs will be viewed positively with proper exposure and community education. A positive community attitude for your project is essential if you are to be successful. There are a number of ways this can be achieved.

GAIN COMMUNITY LEADER SUPPORT

Throughout the campaign, more and more of the leaders in your community have to become supporters of the project. As proposals are received, presentations made, and fundraising efforts carried out, you must "pull in" other leaders in the community. Their involvement and support will have the effect of increasing the overall credibility of the campaign. Involve key leaders by:

- Keeping in touch with them through informal contacts
- Presenting leaders with requests for specific assistance
- Recognizing the efforts of leaders with letters, token gifts, publicity
- Keeping leaders informed on the progress of the campaign

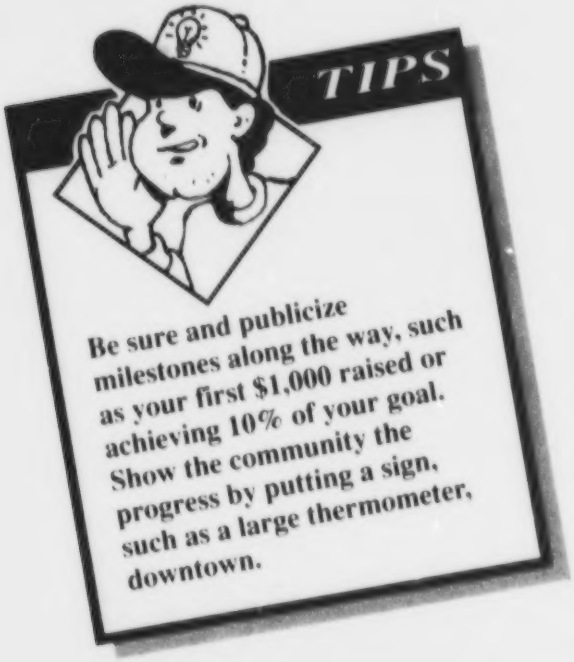
Most community leaders like to be "in the know". Managing the action stage of your fundraising program involves ongoing liaison with community leaders. Some will get involved; others will simply want to know what is going on.

MAKE PROGRESS

While you are carrying out the implementation phase, you can measure your success by the answers to the questions:

- Is progress being made?
- Are we succeeding in our fundraising efforts?

If the answers to these questions are "yes", then you are ready to go on to the next step - that of communicating to the


TIPS
Be sure and publicize milestones along the way, such as your first $1,000 raised or achieving 10% of your goal. Show the community the progress by putting a sign, such as a large thermometer, downtown.

community how you have made the progress. This exercise is important in order for your group to communicate success to the community.

The following questions can help you gauge your progress:

- How are we progressing?
- Does the community know of this progress?
- Is there a sense developing that we *are* winning?
- How is the progress being passed on to the community and all of its members?
- How is the information being passed on to the outside organizers who are, or may be, potential funders?

INFORM THE COMMUNITY

The community must be kept informed of progress if the positive image of your project is to increase. To do this

TROUBLESHOOTING GUIDE

WHAT IF...

You are near the end of your campaign and you have not reached your goal?

THEN...

- Stop. Announce your results but without comparing them to your goals or to last year's campaign.
- Organize a new and special campaign or project to make up the shortfall.
- Hold a general meeting to discuss what went wrong and what to do next. Don't place blame but do analyze your weaknesses.
- Adjust your overall plans and downsize your project.

effectively, try some of the suggestions provided by northern fundraising projects.

- Keep your leaders aware of what is happening.
- Make sure you have a publicity chairman, committee and plan.
- Circulate newsletters weekly, monthly or bimonthly.
- Implement school awareness programs.
- Post signs and posters.
- Hold public meetings and workshops to address groups.
- Maintain regular personal contact with key individuals such as the local MLA or MP and significant groups, like municipal council.

As your community is kept informed of your progress, its positive perception of the project will continue to grow.

Perseverance Works

Before a campaign becomes successful, the board members, the members of your fundraising committee, and your volunteers will likely go through periods of discouragement. The hard work, the long days, the intervals of lukewarm community response can all take their toll. Leadership becomes critical during these "down" periods. In addition to all the technical "do's and don'ts" that a committee must consider throughout the course of a campaign, keeping an overall perspective and a positive attitude is essential. Perseverance will pay off and will help you and your group through the rough times. If you are doing the right things and following the other steps, the project *will* come together.

Always remember that there will be slow discouraging times when fundraising is underway. Attitude and perseverance are essential qualities of successful fundraising efforts.

Turning The Corner

One of the most satisfying experiences that can occur during a fundraising program is the feeling which says, "I think we're going to make it!" One week that feeling isn't there, the next week it is. All the work of planning, organizing, promoting and evaluating begins to come together. The momentum of the project increases ever so slowly at first, almost imperceptibly, but sooner or later it has a speed of its own. The phenomenon of "turning the corner" creates a particular force in the community. You can almost hear people and organizations saying: "This project is going to succeed. I'd better support a winner." People who were initially neutral begin to notice who else is involved and contributing. These same people often become true believers of the project and "jump aboard". As one northern fundraiser said:

> **"One day the residents seemed to suddenly realize that the project was going to be a tremendous benefit to the community. Our work became much easier after that feeling emerged."**

When you turn the corner, people "want in" and your job becomes much easier. While you probably will be as busy as ever, the emphasis has changed. Your task now is to bring the project to a smooth but inevitable conclusion.

It's a Wrap... Closing Successfully

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It's a Wrap... Closing Successfully

You did it! You met the target of your fundraising campaign! Congratulations on a job well done. You will be able to bask in the glory and satisfaction only briefly though, as there are still a few steps left to wrap up your project, recognize your donors and volunteers, and set the stage for future success.

Tying Up The Loose Ends

Before you can close the files of your fundraising campaign, there are a few important aspects that you will need to look after.[27]

CLEANING THINGS UP

Tie up the loose ends. Return equipment you have borrowed or rented over the course of the campaign. Close bank accounts. Take a good look around for outstanding items that need to be addressed. Cleaning up your campaign quickly reflects well on your organization; or, rather, *not* cleaning the campaign up quickly reflects poorly on your organization. Try not to lose momentum after reaching your campaign goal.

COLLECTING THOSE PLEDGES

You will no doubt have some outstanding contributions that remain to be collected following the campaign. Get on them! Send out letters to remind donors of their commitment; telephone the ones you know personally with a friendly reminder. Plan to remind them again after three months if they still haven't responded. Bear in mind that some may never honor their commitment. There will always be some write-offs.

DOING THE PAPERWORK

While the campaign is still fresh in everyone's mind, do the paperwork. It is easy to let this task slide yet it is an important part of the campaign.

Have all the committee chairmen provide a written report on their respective committees and activities. The report should include a discussion on each of the following:

- Committee members and responsibilities
- Schedule of events
- Budget
- Timing of activities and tasks
- Evaluation and recommendations for improvement

The evaluations completed on each activity or special event will be especially valuable to review and compare. Which activity:

- Brought in the most money?
- Received the most publicity?
- Was best attended?
- Was most successful in raising the profile of your organization?
- Made the best use of the volunteers?
- Was the easiest to carry out?
- Was the most difficult to carry out?

This information will be valuable to you in the future should you wish to turn one or more of the activities into an annual event or should you undertake another major fundraising campaign. You can also share your information with other community groups looking to raise money for other projects.

Following the successful completion of the indoor pool, the Peace River Indoor Pool Society put together a manual summarizing its experience and providing tips and suggestions on capital fundraising. The enterprising society is selling the book to raise money and providing consultive services to interested groups.

PREPARING FINANCIAL STATEMENTS

If your organization was authorized under the Public Contributions Act to fundraise,

it must complete a financial statement of campaign revenue and expenses within 30 days after the completion of the campaign. The Act specifies that:

- If less than $5,000 was raised, the organization is exempted from providing a financial statement.

- If $5,000 - $50,000 was raised, the financial report can be prepared by an organization member.

- If more than $50,000 was raised, or a charitable promotion business was used to fundraise, then an independently audited financial statement prepared by a qualified auditor is required.

Rewards And Recognition

If you've been going "by the book" you will have been recognizing your supporters all along. Now that the campaign is over, though, final rewards are in order.

Write to all donors and thank them again for their contribution. Let them know what their gift means to you, your organization and those who will benefit from the project. Don't forget to also thank anyone who donated goods or services in-kind.

Send a letter of thanks to anyone else who supported your campaign. Media people and post office personnel are just a few of those who might have played a role in the success of your campaign. Brainstorm with your committee chairmen to ensure no one is overlooked.

Your volunteers deserve a special thanks.[28]

- Have a special recognition evening. Honor your volunteers with a wind up dinner or wine and cheese social.

- Create tangible rewards. Present volunteers with an inscribed plaque, a lapel pin, a medal or a certificate.

- Make special mention in the program or in a newsletter.

- Send each a personalized letter mentioning individual efforts and recognizing contributions.

- Arrange for public recognition by getting their pictures printed in the local paper.

However you reward your volunteers, make it meaningful. Something that is a particular reminder of the campaign itself would be appreciated, for example a brick with an engraved plate on it for a capital fundraising project. Be creative and sincere.

Setting The Stage For Future Success

The task of fundraising is not to get donations but to develop donors. Maintain those donors by protecting and managing their investment and recognizing their contribution.[38]

Individuals, groups and organizations which contributed to your campaign will be your supporters in the future. You can have an ongoing source of funds if you treat your donors and sponsors with respect, consideration, and gratitude.

Keep donors and sponsors informed of your activities. Send newsletters, press clippings, bulletins. Supporters are not impressed if they only hear from you when you need money, goods or services. Develop a close relationship with them. Ensure that those who require regular updates and financial reports are promptly sent thorough and complete information.

When you complete your project, the reason for the fundraising, let the donors and sponsors know. Write a final report (about five pages) and include an evaluation of the project. Send the report out to your major supporters. If you can also send a copy of your final product, do it. Projects such as studies, reports or slide shows would be appropriate to send. Let other sponsors and donors know it is also available to them.

Maintain good fundraising records. Keep accurate files of all your supporters and a funding schedule of whom to approach. You don't want to appear disorganized by contacting someone twice or omitting a supporter completely.

SUMMARY

This handbook presents an overview of fundraising and the steps to take to help achieve success. While each project will be different and each campaign unique, the one thing that will be the same in all fundraising is the type of people who take these projects on and make them work. Your energy, determination and commitment will be the determining factor in your success. Use that spirit to Go for the Gold!

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Case study of a fundraising campaign

Grassland Community Centre

STEP 1 - DOING THE GROUNDWORK

At an annual meeting of the Grassland Agriculture Society, discussion turned to how the Grassland Community Centre was falling into a state of disrepair. The Agriculture Society felt that an active community centre was critical to keeping the community alive. They discussed the problem at length for several months and decided to rebuild the centre.

The Ag Society saw this was a big project that could not succeed without the support of the entire community. Grassland is a small hamlet of about 65 people and is part of a rural community of 400 residents. It is also unique in that there are three other community centres within a 20 mile radius. In order to determine community support for the idea, a short survey was drafted and mailed out. Sixty percent of the respondents were in favor, so the decision to go ahead was finalized.

The society formed a building committee made up of positive, aggressive and community-minded individuals. A project director was hired for $1,000 per month to chair the building committee, be in charge of the construction and oversee the entire project. The committee drafted some basic designs of what they wanted and took them to a local person who drew up the blueprints.

The entire society membership was involved in the fundraising tasks. A charitable donations number was applied for and, after several months, finally received.

STEP 2 - DEVELOPING THE STRATEGY

The building committee's research identified the cost of a new centre to be $250,000 to $300,000. They already had commitment for $105,000 and they could also count on $45,000 in Agriculture Society grant funding. That left $150,000 to be raised locally.

The society already held several fundraising events annually, such as a ball tournament and a dance; all of the proceeds would go to the hall. They knew they would get cash donations and they counted on local contractors, businesses and farmers to volunteer their time and their services.

The committee approached the local MLA, MP, and reeve for support. The

local paper was contacted to let it know of the plan.

STEP 3 -
LAUNCHING THE CAMPAIGN

The committee initiated the campaign. They did some research to find out where grant money might be available, got application instructions and sent them in.

- A door-to-door canvass was carried out for local residents.
- Businesses were also canvassed. About $3,000 was raised.
- Proposals were written and submitted, resulting in:
  - $10,00 Recreation and Parks.
  - $30,000 Community Recreation and Culture (CRC) grant.
- Opportunity Corps donated labor.
- Light fixtures, doors, windows, gas stove and a fan were all donated from an old building in Athabasca.
- One of the three local halls sponsored a Hallowe'en Dance and donated the proceeds.
- Material was sold from the old building to raise money.

There was tremendous response from the local business community. For example, gravel was donated and hauled in and a cherry picker and five men were donated for one day. As the campaign and project got going, people became more enthusiastic and it snowballed. As things needed to be done, someone would just step in and do it.

During the building construction, the project ran out of money. The society borrowed $45,000, putting the property up as security.

"Everyone involved, even the negative people, helped the project. They could see that it was going to be, and would be, a success."

STEP 4-
MANAGING THE PROCESS

There was a strong volunteer contingency, managed by the project director. This worked out very well.

Regular contact with the media was maintained. The local paper would do stories and the society sent in articles. The local MLA was also very involved and assisted in obtaining some grant funds.

Progress was constantly evaluated.

"You pretty well have to know where you're at and where you're going. And if necessary, adjust. Instead of a $16,000 item we bought the item used and will replace it in five years."

STEP 5 -
CLOSING SUCCESSFULLY

A grand opening was held when the project was complete. Contributions were recognized.

Recognizing donors and volunteers was important. Everyone who contributed something, cash, labor, or in-kind donations, had their name on a plaque in the hall.

> *"We tried to make everyone feel important. Some did more because they had time, ability or resources, but everyone gave what they could and that was enough."*

KEYS TO SUCCESS

- It was successful as everyone got involved; we worked as a team and shared the credit. We're much stronger together than alone.
- Be patient with proposals. Keep sending them what they want. Plan carefully and cover all your bases.
- Be optimistic. Say you can do it, even if there are those who say you can't.
- If you put your mind, heart and muscles behind it, it can be done!

Case study of a special event

Peace Indoor Pool Society: Art Auction

STEP 1 - ORGANIZE YOUR COMMITTEE

The secretary of the Peace Indoor Pool Society organized the first meeting for the special event. She invited people with special skills, such as artists and musicians. At the meeting, they:

- Selected a chairman, minutes recorder, committee members
- Brainstormed re others who could be potential committee members

As the planning progressed, a number of committees were set up:

- Arts and Crafts
- Organizations
- Bar
- Publicity
- Tickets
- Celebrity
- Raffle

Three general meetings were held; the committees met as necessary. The chairman and the office manager of the Pool Society followed up with each commitment and reassigned duties or assisted as necessary.

STEP 2 - CHOOSE AN EVENT AND THEME

The committee chose the theme of Aqua Art; an art, fine crafts and celebrity auction. The theme related to the pool and the water theme could be used throughout the program.

They wanted the event to be an elegant, gala evening with candlelight and wine.

The committee brainstormed about who they needed to talk to for donations– such as local artists, celebrities, craft people, and other donors.

STEP 3 - CHOOSE THE DATE AND TIME

A date and an alternate date were selected in April as there were not many conflicts with either sport or social events.

The date that was actually selected was based on the availability of the auctioneer.

The viewing of the art, cocktails and raffle ticket sales would take place at 6 p.m. Dinner was set at 7 p.m., with raffle draws and the auction following the meal.

STEP 4 - CHOOSE A LOCATION

The Al "Boomer" Adair Recreation Centre was selected as the location of the event. It was chosen for its large size, good lighting and space for displays. Also, the rent was donated. The lack of kitchen facilities in the Centre also affected decisions regarding catering services.

Tables and chairs were donated by community services and were set up in small arrangements of six to eight people.

STEP 5 - SET THE BUDGET AND PRICE

The costs of the event were estimated. The expenses were then doubled to set the price of the tickets at $20.

Raffle tickets were also sold at $2 each or three for $5.

The final budget included the following expenses and revenues:

Expenses

Liquor	$ 3,000
Caterer	$ 2,100
Printers	$ 234
Decorations	$ 308
Framing	$ 355
Postage	$ 56
Other	$ 77
Total Expenses	**$ 6,130**

Revenues

Door Raffle	$ 437
Ticket sales	$ 3,100
Advertising	$ 100
Liquor sales	$ 1,446
Liquor return	$ 2,151
Auction Sales	$11,885
Total Revenue	**$19,119**
PROFIT	**$12,989**

STEP 6 - ARRANGE THE DETAILS

Caterer

There were several requirements of the caterer who had to provide glass dishes, be able to transport all of the food as there were no kitchen facilities, and do the clean up. A chef was selected from a local hotel as he had equipment, staff and an excellent reputation.

It was decided to have a buffet meal, as it would be a much faster way to serve a large number of people. Organizers

ensured the menu was elegant and there was plenty of food as this was seen as critical to creating "happy buyers".

Bar

The bar had one coordinator and two bartenders. The coordinator obtained the liquor licence and consulted with a local restaurant on the types and amounts of wine and other liquors to purchase. They chilled the wine for 24 hours in the cooler of a local bar before transporting it to the Recreation Centre.

A pop dispenser was donated for mix and a local restaurant donated ice from its ice machine. Corkscrews and glasses were obtained.

Publicity

A number of publicity methods were used:

- Posters
- Radio interviews and advertisements
- Newspaper advertisements
- Ticket giveaways (4)

Auction Items

Three committees were set up for the auction items: auction organization, arts and crafts procurement, and celebrity / donated items.

Arts and Crafts Committee

The committee sent a letter and donation form to all artists and craftsmen in the region. Lists of artists were obtained from the Art Society, the craft group - Artisans of the Peace, and the North Peace Adult Education Consortium. The letter was followed up with a phone call.

All art pieces received were numbered for control. Arrangements were made to get the pieces framed if necessary; most artists donated the framing as well. Safe storage was available in the vault of the town office.

Arrangements were made to display the art in store windows before the auction. Local artists set up the displays.

Celebrity/Donated Items Committee

The auctioneer advised that 85 items be auctioned to keep the evening a reasonable length. This committee solicited possible items to bring the total number to 85. Some items included:

- The first swim in the indoor pool
- The first pass to the indoor pool
- Yard clean up

Auction Organization Committee

The organization committee worked closely with the auctioneer and followed his advice. The auctioneer's papers and forms were used. Volunteers were lined up to:

- Do the paperwork (3)
- Allocate bid numbers (2)
- Receive payment (3)
- Display the art (Can Can Girls)

Both the regular live auction and a silent auction took place. The silent auction generated more money per item and as well was fun and ongoing.

Recreation Centre Set-Up
In getting the recreation centre ready for the evening, the art had to be displayed and the room decorated and set up.

Art Display

Displaying the art at the recreation centre involved the help of many people. A local art teacher and two former students donated their service and time. They used the following materials:

- Easels - Donated by the Consortium and local schools.
- Sheets to drape in the background - Donated from the hospital.
- Room dividers - Borrowed from the provincial building.
- Labels - Done by a local calligrapher.
- Other material- Tacks, nails, hammer, masking tape.

Volunteers were needed to pick up the art and collect and return the easels and sheets.

Set the Scene

The high school drama class of 10 students and their teacher donated their skills in designing and decorating the Recreation Centre.

Other Items
A number of other items were required and were donated whenever possible.

Decor

- Tablecloths - Donated from the hospital and a local restaurant, who also cleaned them afterward.
- Linen napkins - Borrowed from a local hotel.
- Balloon decorations - Obtained at cost from a local business.

Meal

- Urn - Borrowed from the caterer.
- Coffee and supplies - Supplied by the caterer.

Printing

- Auction program - Creative design done locally; a special price on printing was negotiated.
- Tickets - Designed for free by the local printer. Three hundred were printed; 190 were sold and some were given away.

Other

- Sound system - Donated by auctioneer.
- Cash floats - These were needed for tickets at the door, raffle tickets, bar, and auction items.
- Cash box.
- Visa and Mastercard machines - Donated by local car dealer.
- Coat racks.
- Courtesy van to drive people home after the evening.

Personnel

- Set up and clean up - Six people were needed.
- Monitor the coffee and tea throughout the evening - Several people did this.
- Sell raffle tickets - Members of the swim club dressed as Can Can Girls using costumes borrowed from the local theatre group.
- Master of ceremonies.
- Auctioneer - The auctioneer was selected based on his sense of humor and experience in charity auctions. He also donated his services.

STEP 7 -
WRAP IT UP

Certificates of appreciation and thank you letters were sent out to all who donated goods or labor.

TIPS AND SUGGESTIONS

There were a few things that could have been done differently that would have added to the success of the event:

- A pre-viewing should have been open to the public in the afternoon of the event, with tickets still available to purchase.

- The least expensive items should have been offered at the beginning of the auction (within the first 20 items) until people got warmed up.

- Raffle tickets should have been sold all night and drawn every 30 minutes, starting with the smaller items.

Appendices

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Appendix A
Surveyed Community Projects

Basketball Backboard Project

Girls' High School Basketball,
F.G. Miller Sr./Jr. High School
Contact: Jim Hawkins,
Box 174, Elk Point T0A 1A0

Bicentennial Project

Fort Vermilion and District
Bicentennial Association
Contact: Al Toews,
Box 400, Fort Vermilion T0H 1N0

Blacksmith Shop

Sexsmith Museum Society
Contact: Alida Logan,
Box 252, Sexsmith T0H 3C0

Bonnyville Parent Child Centre

Bonnyville Play and Learn
Child Care Society
Contact: Kathy Wiebe,
4112-40 Ave., Bonnyville T9N 1T6

COPS

Children's Outdoor
Playground Society
Contact: Janice Lerohl,
Box 801, Fox Creek T0A 1P0

Grassland Community Centre

Grassland and District Agriculture
Society
Contact: John Holdis,
Box 63, Grassland T0A 1V0

Grouse's Pouch

Kayas Cultural Centre
Contact: Clifford Ribbonleg,
General Delivery, Fox Lake T0H 1R0

Lifeline Project

St. Paul and Area Lifeline Society
Contact: Elsie Harper,
Box 980, St. Paul T0A 3A0

Peace River Regional Pool

Peace Indoor Pool Society
Contact: Betty Kruse,
11705-101 Street, Peace River T8S 1L8

Peekiskwetan Let's Talk Society

Peekiskwetan Let's Talk Society
Contact: Jeanne Cardinal,
General Delivery, Wabasca T0G 2K0

Prairie Gallery

Prairie Gallery Society
Contact: Elizabeth Ginn,
10209-99 Street, Grande Prairie
T8V 2H3

Swan Hills Golf Course

Swan Hills Golf and Country Club
Contact: Don Kelm,
Box 325, Swan Hills T0G 2C0

Unity House

Fort McMurray Women's
Crisis Centre Society
Contact: Bea Bussieres, Box 6165,
Fort McMurray T9H 4W1

Appendix B
Ideas for Special Events and Activities

SALES

Auctions
- Antique
- Celebrity
- Cake
- Silent
- Dream
- Art

Food Sales
- Bake-mobile
- Citrus Fruits
- Ice Cream
- Egg Drive

Plants/Flowers
- Christmas Trees
- Wreaths
- Plants, Seeds

Souvenirs / Promotions
- T-Shirts
- Ties
- Balloons
- Decals and Stickers
- Mugs
- Photo Buttons

Printed Goods
- Local Greeting Cards
- Art Cards
- Personalized Cards
- Engagement Calendar
- Community Calendar
- Newsletter
- Classified Ads
- Town Newssheet
- Local Directory

Concessions
- Quality Ice Cream
- Frozen Yogurt
- Specialty Sandwiches
- Corn on the Cob
- Specialty Coffees

Door-to-door Sales
- Chocolate Bars
- Tulip Bulbs
- Light Bulbs
- Magazines

Second Hand
- Bazaar
- Rummage Sale
- Flea Market
- Thrift Shop
- Garage/Yard Sale
- Consignment Sale

Other
- Book Fair
- Garden Sale
- Cookbooks
- Handicrafts
- Clean Rags
- Raffles
- Ticket Sales

EVENTS

Shows
- Antique
- Boat
- Arts and Crafts
- Fashion
- Talent
- Horse
- Pet
- Amateur Night

A-Thons
- Walk
- Swim
- Read
- Skate
- Dance

Contests
- Talent
- Essay
- Ugly Dog
- Eating
- Garden

Tournaments
- Golf
- Bowling
- Bridge
- Chess
- Monopoly
- Scrabble
- Cycling
- Darts
- Fishing Derby
- Bonspiel

Dance
Gala Ball
Big Band

Party
Beach Party
Scavenger Hunt
Bridge Party
Masquerade
Pool Party
Block Party
Street Party

Dinner
Gourmet
Celebrity Chef
Progressive Dinner
Lobster Bake
Barbecue
Box Social
Picnic

Theatre
Live
Movie
Dinner

Guessing Games
No. Jellybeans
No. Tins in a Pyramid

Guest Speakers
Motivational
Educational
Poetry Readings
Literary Readings

Other
Exhibition Events
Casino
Fair
Festival
Cabaret
Donkey Baseball
Dunk Tank
Wine Tasting

SERVICES

Lessons
Bridge
Dance
Exercises

Cleaning Service
Chimney Sweep
Domestic Service
Car Wash
Dog Wash
Lawn Mowing
Odd Jobs
Window Washing

Rental Service
Party Supplies
Wedding Supplies
Costumes
Baby Equipment

Demonstrations
Cooking
Make-up
Crafts

Tours
House/Garden
Historic Sites
Hiking
Bus Trips

Other
Baking
Babysitting
Bicycle Repairs
Bottle Drive
Bridal Secretarial Service
Catering
Disc Jockey Service
Deliver Telephone Books
Flyers
Door-to-door Drycleaning
Giftwrapping
Hayrides
Pet Portraits
Pet Sitting
Pet Walking
Plant Sitter
Recycle Newspapers
Sewing
Singing Telegrams
Tutoring
Coat-checking

Appendix C
Resources

AGENCIES

Resource Centre for Voluntary Organizations

Room #318, 7th Street Plaza Campus
Grant MacEwan Community College
10030 - 107 Street
Edmonton T5J 3E4
Telephone: 441-4623

The Resource Centre provides a number of services to non-profit groups, such as:

- Resource bank of information on volunteer management and fundraising programs
- Quarterly newsletter
- Brown bag workshops on a variety of fundraising and volunteerism topics
- Assistance to groups in developing organizational, marketing and fundraising skills
- Liaison and information network within the non-profit community

The Canadian Centre for Philanthropy

74 Victoria Street
Suite #920
Toronto M5C 2A5
Telephone: (416) 368-1138

Members of the Canadian Centre for Philanthropy can access a number of services:

- A newsletter to keep abreast of issues, trends and techniques
- Toll-free hotline service to answer questions
- Research services on foundations

DEPARTMENTS

Alberta Culture and Multiculturalism

#2501 Provincial Building
10320 - 99 Street
Grande Prairie T8V 6J4
Telephone: 538-5408

#316 Provincial Building
5025 - 49 Avenue
St. Paul T0A 3A0
Telephone: 645-6328

Alberta Recreation and Parks

Box 1454
5025 - 49 Avenue
St. Paul T0A 3A0
Telephone: 645-6353

Box 1078
4917 - 53 Avenue
High Prairie T0G 1E0
Telephone: 523-6536

#1701 Provincial Building
10320 - 99 Street
Grande Prairie T8V 6J4
Telephone: 538-5300

Bag 900-11
3rd Floor, 9621 - 96 Avenue
Peace River T8S 1T4
Telephone: 624-6295

Along with a number of print resources, Alberta Recreation and Parks sponsors the Skills Program which provides workshops to non-profit groups on such topics as:

- Time management
- Marketing your organization's programs
- Working with volunteers
- Managing your finances
- Building an organizational plan

To find out more, contact the coordinator at:

Wild Rose Foundation

Suite #2100
Royal LePage Building
10130 - 103 Street
Edmonton T5J 3N9
Telephone: 422-9315

This provincial foundation receives its money from lottery funds and is very accessible to non-profit groups. It has also sponsored two major conferences for non-profit groups, with workshops on fundraising, volunteer management and financial management. Contact them for plans on future conferences.

Appendix D
Regulations and Procedures

LIQUOR LICENCES

If you are having a special event and are planning to serve liquor, you will need to get a permit from the Alberta Liquor Control Board. You must be a society and the function must be open to members and guests only. The ALCB "special permit" should be applied for two weeks before the event.

Visit your *local ALCB* outlet for details on applying or contact the *Special Permit Department* of the ALCB at 424-8030 or Box 2360, Edmonton T5J 2R4. The ALCB handbook, *Eight Ways to Ensure your Special Permit Function is a Success*, provides additional tips and suggestions.

LOTTERY LICENCES

Provincial legislation covers such activities as bingo, raffles, gambling and games of chance. In order to carry out such an event, you need to get a licence and be a charitable or religious organization.

Application forms are available from your *local RCMP* detachment or contact the *Alberta Gaming Commission* at 427-9796 or J.E.Brownlee Building, South, 5th Floor, 10365 - 97 Street, Edmonton T5J 3W7.

FUNDRAISING CAMPAIGNS

All charitable fundraising campaigns, such as door-to-door canvassing, must be authorized by the provincial government and comply with the *Public Contributions Act*. Applications for permits must be made 30 days before the start of the campaign and include such information as:

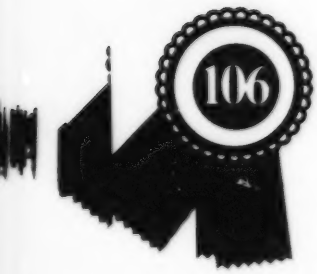
- Name and address of organization and leaders
- Location, objectives and duration of campaign
- Estimate of costs and revenues
- Disposition of funds following the campaign

The brochure: *Planning a Fund Raising Campaign* and application forms can be obtained from the following regional offices of *Alberta Consumer and Corporate Affairs:*

Peace River
Provincial Building
2nd Floor, 9621 - 96 Avenue
Peace River T8S 1T4
Telephone: 624 - 6214

Fort McMurray
Provincial Building
5th Floor, West Tower
9915 Franklin Avenue
Fort McMurray T9H 2K4
Telephone: 743 - 7231

Grande Prairie
Provincial Building
2nd Floor, 10320 - 99 Street
Grande Prairie T8V 6J4
Telephone: 538 - 5400



Or, contact the *Administrator, Public Contributions Act,* Alberta Consumer and Corporate Affairs, at 422-1592 or 9th Floor, 10065 Jasper Avenue, Edmonton T5J 3B1.

Fundraising campaigns taking place on reserves must have the approval of the *band council.*

As of January 15, 1990, professional fundraisers are required to be licenced and bonded with Consumer and Corporate Affairs. If a group hires a charitable promotions business, they must have a written contract and they must verify that the business is properly licenced and bonded. Further details are contained in the brochure, *Planning a Fundraising Campaign.*

TIPS
Public health inspectors and district home economists can also provide helpful tips, suggestions and ideas for your events.

OTHER REGULATIONS

Insurance

Ensure you have proper building and liability insurance, particularly for events which may involve physical activity or physical contact. Contact your local *insurance company.*

Fire Regulations and Guidelines

Rules are set for halls or community facilities. Contact your *local fire marshall.*

Health Guidelines

Any event involving the preparation, handling or storage of food should be checked out with the *public health inspector* at your local health unit. A permit is not required, but all events need to comply with minimum standards. The brochure, *Good Practices for Food Handlers* provides this basic information and is available at health unit offices.

Safety/Crowd Control

Large events, such as walk-a-thons or street dances, may require special attention. Contact your *local RCMP* to advise them of the activity and, if necessary, ask for their support and assistance.

Local Bylaws

Municipal councils may have local bylaws in place that could affect your event, such as whether you can set up a concession stand on the sidewalk or the street. Contact your *local bylaw officer* to review your plans and ensure compliance.

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